

User Manual

Aptean Food and

Beverage ERP

Advanced Pricing

Product Documentation



Contents

Release notes	.....
2514.3.0.0	.....
2514.2.0.0	.....
2514.1.0.0	.....
2514.0.0.0	.....
2513.2.0.0	.....
2513.1.0.0	.....
2513.0.0.0	.....
2512.0.0.0	.....
2511.0.0.0	.....
2510.1.0.0	.....
2510.0.0.0	.....
2509.0.0.0	.....
2508.0.0.0	.....
2507.0.0.0	.....
2506.1.0.0	.....
2506.0.0.0	.....
2505.0.0.0	.....
2504.2.0.0	.....
2504.1.0.0	.....
2504.0.0.0	.....
2503.1.0.0	.....
2503.0.0.0	.....
2502.1.0.0	.....
2502.0.0.0	.....
2501.1.0.0	.....
2501.0.0.0	.....
2410.1.0.0	.....
2410.0.0.0	.....
2409.0.0.0	.....
2408.0.0.0	.....
2407.2.0.0	.....



2407.1.0.0	.....
2407.0.0.0	.....
2406.2.0.0	.....
2406.1.0.0	.....
2406.0.0.0	.....
2405.4.0.0	.....
2405.3.0.0	.....
2405.2.0.0	.....
2405.1.0.0	.....
2405.0.0.0	.....
2404.1.0.0	.....
2404.0.0.0	.....
2403.1.0.0	.....
2403.0.0.0	.....
2402.3.0.0	.....
2402.2.0.0	.....
2402.1.0.0	.....
2402.0.0.0	.....
2401.0.0.0	.....
2302.0.0.0	.....
2301.3.0.0	.....
2301.2.0.0	.....
2301.1.0.0	.....
1.14.119061.0	.....
1.13.116148.0	.....
1.12.115164.0	.....
1.12.104941.0	.....
1.11.93546.0	.....
1.10.93063.0	.....
1.10.92682.0	.....
1.10.91830.0	.....
1.9.80814.0	.....
1.8.76923.0	.....
1.7.65829.0	.....
1.6.63626.0	.....



1.5.53922.0	.....
1.4.49678.0	.....
1.3.46580.0	.....
Introduction	.....
Setup	.....
 Manage permission sets	.....
 General setup	.....
 Set up advanced pricing	.....
 Set up purchase price reference date	.....
Advanced pricing method hierarchy	.....
Advanced pricing method hierarchy with lot attribute values	.....
Information about the applied sales price and discount	.....
Information about the applied purchase price and discount	.....
Advanced pricing functionality	.....
 Manually change sales price and/or discount	.....
 Manually change purchase price and discount	.....
 Freeze sales price and discount	.....
 Freeze and unfreeze purchase price and discount	.....
 Place a hold on sales order lines for pricing	.....
 Manage the reprice on sales orders	.....
 Set up the reprice on a customer level	.....
 Automatic reprice on sales orders	.....
 Manual reprice on sales orders	.....
Copy and correct functions in sales documents	.....
Copy and correct functions in purchase documents	.....
Archived sales documents	.....
Archived purchase documents	.....
Posted documents	.....
Manage bracket pricing	.....
 Set up bracket pricing group	.....
 Configure bracket pricing threshold	.....
 Calculate bracket threshold by weight	.....
 Calculate bracket threshold by quantity	.....
 Calculate bracket threshold by weight and quantity	.....
 Calculate bracket threshold by weight or quantity	.....



Advanced Pricing

Create sales quote with bracket pricing	.....
Create sales order with bracket pricing	.....
Create sales invoice with bracket pricing	.....
Manage price list reports	.....
Create price report templates	.....
Generate price list reports	.....
Integrations	.....
Aptean Advanced Attributes	.....
Aptean Commodity Harvest	.....
Aptean Service Provisioning	.....
Aptean Backorder Management	.....
Aptean Customer Item Catalog	.....
Aptean Combine Shipments per Period	.....
Aptean Packaging	.....



Release notes

Article • 12/10/2025 • 2 min read

To view what's new or changed in each release of the Aptean Advanced Pricing extension, select the specific release version.

Date	Release version	Description
December 2025	2514.3.0.0	Stability release
November 2025	2514.2.0.0	Stability release
November 2025	2514.1.0.0	Stability release
November 2025	2514.0.0.0	Feature release
November 2025	2513.2.0.0	Stability release
October 2025	2513.1.0.0	Stability release
October 2025	2513.0.0.0	Feature release
September 2025	2512.0.0.0	Feature release
September 2025	2511.0.0.0	Feature release
August 2025	2510.1.0.0	Stability release
July 2025	2510.0.0.0	Feature release
July 2025	2509.0.0.0	Feature release
July 2025	2508.0.0.0	Feature release
July 2025	2507.0.0.0	Feature release
April 2025	2506.1.0.0	Stability release
April 2025	2506.0.0.0	Feature release
April 2025	2505.0.0.0	Feature release
March 2025	2504.2.0.0	Stability release
March 2025	2504.1.0.0	Stability release
March 2025	2504.0.0.0	Feature release



February 2025	2503.1.0.0	Stability release
February 2025	2503.0.0.0	Feature release
February 2025	2502.1.0.0	Stability release
January 2025	2502.0.0.0	Feature release
January 2025	2501.1.0.0	Stability release
January 2025	2501.0.0.0	Feature release
December 2024	2410.1.0.0	Stability release
December 2024	2410.0.0.0	Feature release
December 2024	2409.0.0.0	Feature release
November 2024	2408.0.0.0	Feature release
November 2024	2407.2.0.0	Stability release
October 2024	2407.1.0.0	Stability release
October 2024	2407.0.0.0	Feature release
September 2024	2406.2.0.0	Stability release
September 2024	2406.1.0.0	Stability release
September 2024	2406.0.0.0	Feature release
August 2024	2405.4.0.0	Stability release
August 2024	2405.3.0.0	Stability release
May 2024	2405.2.0.0	Stability release
May 2024	2405.1.0.0	Stability release
May 2024	2405.0.0.0	Feature release
May 2024	2404.1.0.0	Stability release
April 2024	2404.0.0.0	Feature release
April 2024	2403.1.0.0	Stability release
April 2024	2403.0.0.0	Feature release



March 2024	2402.3.0.0	Stability release
March 2024	2402.2.0.0	Stability release
March 2024	2402.1.0.0	Stability release
March 2024	2402.0.0.0	Feature release
February 2024	2401.0.0.0	Feature release
December 2023	2302.0.0.0	Feature release
December 2023	2301.3.0.0	Stability release
December 2023	2301.2.0.0	Stability release
October 2023	2301.1.0.0	Stability release
September 2023	1.14.119061.0	Feature release
September 2023	1.13.116148.0	Stability release
September 2023	1.12.115164.0	Stability release
June 2023	1.12.104941.0	Stability release
April 2023	1.11.93546.0	Stability release
April 2023	1.10.93063.0	Stability release
April 2023	1.10.92682.0	Feature release
April 2023	1.10.91830.0	Stability release
February 2023	1.9.80814.0	Stability release
January 2023	1.8.76923.0	Stability release
November 2022	1.7.65829.0	Stability release
October 2022	1.6.63626.0	Stability release
July 2022	1.5.53922.0	Stability release
May 2022	1.4.49678.0	Feature release
March 2022	1.3.46580.0	Stability release



2514.3.0.0

Release Note • 12/9/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the system updates the **Default Purchase Price Reference Date** field value as *Order Date* on the **Advanced Pricing Setup** page when the field is left blank. This works similarly for the **Purchase Price Reference Date** field on the **Vendors** and **Vendor Templates** pages. This enhancement addresses the issue reported in bug ID #343446.

Resolved issues

The following issue has been resolved in this release.

ID	Description
343446	The system does not update the Default Purchase Price Reference Date field value to <i>Order Date</i> on the Advanced Pricing Setup page when the field is left blank. This issue also occurs for the Purchase Price Reference Date field on the Vendors and Vendor Templates pages.



2514.2.0.0

Release Note • 11/28/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
341693	An error occurs on the Sales Credit Memo page when posting a credit memo that includes order-bound packaging information.



2514.1.0.0

Release Note • 11/26/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.

Resolved issues

The following issues have been resolved in this release.

ID	Description
327686	An error occurs when executing the Release action on the Sales Order page if the Bracket Pricing Group Code field value is left blank and the Calculate Sales Bracket Pricing On Release toggle on the Advanced Pricing Setup page is turned on.
327688	The system incorrectly calculates the total quantity when executing the Calculate Bracket Pricing action on the Sales Order page. This issue occurs when the Threshold Type field value is set to Quantity for the associated code on the Bracket Pricing Groups page.



2514.0.0.0

Release Note • 11/26/2025 • 1 min read

Features

With the feature added in this release of the Aptean Advanced Pricing extension, you can configure a reference date for purchase price determination on the vendor card. This allows companies to centrally manage how the system determines which date to use when looking up prices from price lists. For more information, see [Set up purchase price reference date](#).

UI/UX changes

The **Purchase Price Reference Date** and **Purchase Price Reference Vendor** fields have been added to the **Vendor Card** page.



2513.2.0.0

Release Note • 11/4/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced pricing extension,

- Updates have been made to ensure interoperability with the recent changes in the Aptean EDI extension. For more information, see [What's new in EDI, version 2515.1.0.0](#).
- The translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.



2513.1.0.0

Release Note • 10/22/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
326691	The system fails to update the sales price on the sales quotes when the customer is linked to a reference customer through the Sales Price Reference Setup page.
321519	The system incorrectly updates the Applied Price Unit of Measure Code and Applied Direct Unit Cost field values on the Lines FastTab of the Purchase Order page when a purchase order is created from a sales order. This issue occurs only when the Aptean Trade Management extension is installed.



2513.0.0.0

Release Note • 10/22/2025 • 2 min read

Features

With the features added in this release of the Aptean Advanced Pricing extension, you can:

- Freeze and unfreeze the lines displaying the prices and discount values on both the **Purchase Order** and **Sales Order** pages. For more information, see [Freeze and unfreeze purchase price and discount](#) and [Freeze and unfreeze sales price and discount](#).
- Configure whether manual changes to prices or discounts automatically freeze pricing results. For more information, see [Set up advanced pricing](#).

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension,

- You can edit and manage the **Line Discount Amount** field value on the **Sales Order** page, allowing automatic synchronization of discount values across related pages for improved pricing accuracy.
- The system automatically freezes the related fields whenever a manual price or discount change is made when the **Freeze Price & Discount** toggle is turned on the **Change Applied Line Discount** page and the **Freeze Price & Discount** toggle is turned on the **Change Applied Direct Unit Cost** page.

Additionally, this extension has been updated to ensure interoperability with the recent changes in the Aptean Trading Board extension. For more information, see [What's new in Trading Board, version 2503.0.0.0](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Freeze Price & Discount** and **Unfreeze Price & Discount** actions have been added to action bar and the **Lines** FastTab of the **Purchase Order** and **Sales Order** pages.
- The **Freeze Price & Discount** toggle has been added to the following pages:
 - **Change Applied Line Discount**
 - **Change Applied Direct Unit Cost**
 - **Change Applied Unit Price**
- The following fields have been added to the **Advanced Pricing Setup** page:



- Freeze Sales Price on Manual Change
- Freeze Purchase Price on Manual Change

Resolved issues

The following issue has been resolved in this release.

ID	Description
306579	The system fails to initialize control for freezing price and discount during manual discount changes.



2512.0.0.0

Release Note • 9/24/2025 • 3 min read

Features

With the features added in this release of the Aptean Advanced Pricing extension,

- You can generate price list reports for customers based on specific configurations defined in price report templates. These price list reports are customizable, ensuring accurate pricing information is generated for customers to plan their purchase effectively. For example, you can generate a price list report for all items in a specific item category within a specified date range, providing up-to-date prices for a customer interested in browsing through available products. For more information, see [Create price report templates](#) and [Generate price list reports](#).
- Based on the configuration of the **Customer Card** page,
 - The system automatically applies the current unit price of items to sales order lines when you release or post sales orders. For more information, see [Automatic reprice on sales orders](#).
 - Alternatively, if the automatic reprice is not configured, you can manually execute the **Reprice Sales Orders** action to apply the current unit price of items to sales order lines in open sales orders. For more information, see [Manual reprice on sales orders](#).

This ensures that the system applies the current unit price of items in sales orders. For more information about the setup, see [Set up the reprice on a customer level](#).

- You can place a hold on sales order lines to prevent them from being invoiced due to ongoing pricing negotiations, for example, if the salesperson wants an additional discount or if a customer is negotiating prices via email.

When pricing discussions are settled, you can remove the hold placed in the sales order lines by updating the status so they can be invoiced. For more information, see [Place a hold on sales order lines for pricing](#).

Integrations

The Aptean Advanced Pricing extension has been integrated with the following extensions:

- Aptean [Customer Item Catalog](#)
- Aptean [Combine Shipments per Period](#)
- Aptean [Packaging](#)

For more information, see [Integrations](#).



UI/UX changes

The following UI/UX changes have been made in this release.

- The **Price Report Templates** and **Price List Reports** pages have been added.
- The **Print Price Report** action has been added to the **Customers** and **Customer Card** pages.
- The **Reprice Sales Order** action has been added to the **Sales Orders** and **Sales Order** pages.
- The **Reprice Sales Order** field has been added to the **Advanced Pricing** section on the **Invoicing** FastTab of the **Customer Card** page.
- The **Invoice Hold Status** field has been added to the **Sales Order** page.



2511.0.0.0

Release Note • 9/24/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Backorder Management extension. For more information, see [What's new in Backorder Management, version 2501.0.0.0](#).

Integrations

The Aptean Advanced Pricing extension has been integrated with the Aptean [Backorder Management](#) extension. For more information, see [Integrations](#).



2510.1.0.0

Release Note • 8/27/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
300733	The system incorrectly displays the Applied Direct Unit Cost field value on the Purchase Invoice page after executing the Get Receipt Lines action. This issue arises even when the Direct Unit Cost field value is manually updated on the Applied Purchase Price and Discount page before posting the purchase receipt.



2510.0.0.0

Release Note • 7/30/2025 • 1 min read

Features

With the feature added in this release of the Aptean Advanced Pricing extension, you can define the sales price reference date on the **Customer Template** page. To know more, see [General setup](#)

UI/UX changes

The following fields have been added to the **Customer Template** page:

- Sales Price Reference Date
- Sales Price Reference Customer



2509.0.0.0

Release Note • 7/30/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
266733	The system fails to display the applied trade plan on the Document Trade Lines page of a purchase order when a manual price is added via the Applied Purchase Price and Discount page.
304793	The system incorrectly sets the Unit Amount and Amount field values to <i>0</i> after executing the Recalculate action on the Document Trade Lines page of a purchase order. This issue arises when a manual price is added via the Applied Purchase Price and Discount page.

Note

These issues occur only when the Aptean [Trade Management](#) extension is installed. For more information, see [What's new in Trade Management, version 2506.0.0.0](#).



2508.0.0.0

Release Note • 7/30/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, when the Aptean [Service Provisioning](#) extension is installed, the system automatically selects the **Frozen** checkbox for the lines on the sales and purchase orders created from the **Transfer Ownership** page if you have manually entered a value in the **Unit Price Excl. VAT** and **Unit Cost Excl. VAT** fields on the **Sales** and **Purchase** FastTabs, respectively. For more information, see [Transfer the ownership of items](#).

Integrations

The Aptean Advanced Pricing extension has been integrated with the Aptean [Service Provisioning](#) extension. For more information, see [Integrations](#).



2507.0.0.0

Release Note • 7/2/2025 • 2 min read

Features

With the features added in this release of the Aptean Advanced Pricing extension, you can:

- Apply dynamic pricing based on weight or quantity thresholds using the bracket pricing feature. For more information, see [Configure bracket pricing threshold](#).
- View the **Bracket Pricing** FactBox on the **Sales Quote**, **Sales Order**, and **Sales Invoice** pages. For more information, see [Create sales order with bracket pricing](#), [Create sales quotes with bracket pricing](#), and [Create sales invoice with bracket pricing](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The following pages have been added.
 - Bracket Pricing Groups
 - Bracket Threshold
- The **[]Bracket Pricing Groups** action has been added to the **Advanced Pricing Setup** page.
- The **Calculate Bracket Pricing** action (**Actions > Functions**) has been added to the following pages:
 - Sales quote
 - Sales order
 - Sales invoice
- The **Bracket Pricing** FastTab has been added to the **Advanced Pricing Setup** page.
- The **Bracket Pricing** FactBox has been added to the **Sales Quote**, **Sales Order**, and **Sales Invoice** pages.
- The **Bracket Pricing Group Code** field has been added to the **Invoicing** FastTab of the **Customer Card**, **Ship-to Address**, **Sales Quote**, **Sales Order**, and **Sales Invoice** pages.
- The following fields have been added to the **Advanced Pricing Setup** page.
 - Enable Bracket Pricing for Sales
 - Calculate Sales Bracket Pricing On Release
 - Update Method for Sales Bracket Change



2506.1.0.0

Release Note • 4/25/2025 • 1 min read

Enhancements/Modifications

The translation files for the Swedish (sv-SE) language have been updated with standard texts for better readability.



2506.0.0.0

Release Note • 4/14/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Trade Management extension. For more information, see [What's new in Trade Management, version 2505.0.0.0](#).

Resolved issues

The following issue has been resolved in this release.

ID	Description
278637	The system fails to update the Direct Unit Cost Excl. VAT field value when the Applied Direct Unit Cost field value is manually updated on the Lines FastTab of the Purchase Order page. This issue occurs when the purchase line does not have an associated document trade line and the Aptean Trade Management extension is installed.



2505.0.0.0

Release Note • 4/9/2025 • 1 min read

Features

With the features added in this release of the Aptean Advanced Pricing extension, you can specify reasons for price changes. For more information, see [Manually change sales price and/or discount](#) and [Manually change sales price](#).

UI/UX changes

The **Price Change Reason Code** field has been added to the following pages:

- Change Applied Unit Price
- Change Applied Line Discount
- Change Applied Direct Unit Cost



2504.2.0.0

Release Note • 3/28/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
278674	An error occurs when attempting to open the Sales Order page from the Sales Lines page.



2504.1.0.0

Release Note • 3/13/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
246855	An error occurs when modifying the Applied Direct Unit Cost field value on the Lines FastTab of the Purchase Order page. This issue arises only when the Aptean Trade Management extension is installed.



2504.0.0.0

Release Note • 3/14/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the internal API page has been enhanced to determine and send item prices based on parameters such as customer, location, item details, document date, delivery date, and shipment date.



2503.1.0.0

Release Note • 2/27/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
259156	An error occurs when attempting to edit purchase order lines in Excel when the lines are copied using the Edit in Excel action on the Purchase Order page.



2503.0.0.0

Release Note • 2/11/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Trade Management extension. To know more, see [What's new in Trade Management, version 2501.0.0.0](#).



2502.1.0.0

Release Note • 2/5/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the translation file for the Chinese (zh-CN) language has been added.



2502.0.0.0

Release Note • 1/21/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the **Quantity Expressed in Base UoM** and **Quantity Expressed in the UoM** fields on the **Item Units of Measure** page have been removed from this extension and added to the Aptean Standard Measurements extension. To know more, see [Highlights of Standard Measurements, version 2501.0.0.0](#).

Note

- Businesses using the Aptean Advanced Pricing extension must install the Aptean Standard Measurements extension to ensure full compatibility. However, it is crucial to update the Aptean Advanced Pricing extension to the latest version, with the minimum required version being 2502.0.0.0, after installing the Aptean Standard Measurements extension. This update is essential to ensure that any new item unit of measure quantities are correctly detected and used in document line pricing, especially when alternative unit of measure pricing is required.
- While the system enforces the dependency for installing the Aptean Standard Measurements extension with the Aptean Advanced Pricing extension, it does not enforce the reverse scenario. Therefore, ensure both extensions are updated to maintain seamless functionality.

UI/UX changes

The **Quantity Expressed in Base UoM** and **Quantity Expressed in the UoM** fields have been removed from the **Item Units of Measure** page.



2501.1.0.0

Release Note • 1/17/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. To know more, see [What's new in EDI, version 2409.7.0.0](#).



2501.0.0.0

Release Note • 1/9/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to resolve an issue in drop shipment transactions for the US and Canada localizations. Previously, when the **Direct Unit Cost** field value was indirectly changed on the **Purchase Order** page, the **Unit Cost** field value on the **Sales Order** page was not updated accordingly. This caused the **Cost Amount (Expected)** field value on the **Value Entries** page to be incorrect for drop shipment transactions.



2410.1.0.0

Release Note • 12/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
247911	The system incorrectly displays the Unit Price field value in the sales invoice line upon executing the Get Shipment Lines action on the Sales Invoice page for a shipped sales order when a discount value is entered manually in the Applied Discount Value field.



2410.0.0.0

Release Note • 12/11/2024 • 1 min read

Features

With this release of the Aptean Advanced Pricing extension,

- The system inherits the value of the **Applied Currency Code** field on the sales order line from the **Currency Code** field on the related sales price list line, based on the selected customer and item. This functionality also applies to blanket sales orders, sales invoices, and sales credit memos.
- You can edit the value of the **Applied Unit Price** and **Applied Discount Value** fields on the **Sales Invoice** and **Sales Credit Memo** pages.

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Applied Currency Code** field has been added to the **Lines** FastTab of the **Blanket Sales Order**, **Sales Order**, **Sales Invoice**, and **Sales Credit Memo** pages.
- The **Applied Unit Price** and **Applied Discount Value** fields on the **Sales Invoice** and **Sales Credit Memo** pages have been made editable.



2409.0.0.0

Release Note • 12/5/2024 • 1 min read

Features

With this release of the Aptean Advanced Pricing Extension, you can add the new **Price Change Reason Code** field on the **Sales Price List** and **Purchase Price List** pages to specify reasons for price changes or new records. For more information, see [General setup](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Price Change Reason Code(s)** list page has been added.
- The **Price Change Reason Code** field has been added to the **Sales Price List** and **Purchase Price List** pages.

 Note

> This field is made visible through personalization.



2408.0.0.0

Release Note • 11/28/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Contract Management extension. To know more, see [What's new in Contract Management, version 2404.0.0.0](#).



2407.2.0.0

Release Note • 11/14/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the Aptean EDI extension. To know more, see [What's new in Aptean EDI, version 2408.0.0.0](#).



2407.1.0.0

Release Note • 10/3/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
234297	An error occurs upon executing the Get Shipment Lines action on the Sales Invoice page. This issue occurs when the unit price value is zero or empty on the sales invoice lines.



2407.0.0.0

Release Note • 10/1/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the Aptean [Trade Management](#) extension, to accomodate the integration with the Aptean [Transport](#) extension. To know more, see [What's new in Trade Management, version 2411.0.0.0](#).



2406.2.0.0

Release Note • 9/24/2024 • 1 min read

Enhancements/Modifications

The translation files for the Danish (da-DK) language have been updated with standard texts for better readability.



2406.1.0.0

Release Note • 9/12/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, you can edit the applied direct unit cost value in the **Applied Direct Unit Cost** field on the **Purchase Credit Memo** page. This enhancement addresses the issue reported in bug ID #224131.

UI/UX changes

The **Applied Direct Unit Cost** field has been added to the **Purchase Credit Memo** page.



2406.0.0.0

Release Note • 9/4/2024 • 2 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Catch Weight and Aptean Trade Managements extensions. To know more, see [What's new in version 2405.0.0.0](#) of the Aptean Catch Weight extension and [What's new in version 2409.0.0.0](#) of the Aptean Trade Management extension.

UI/UX changes

The following UI/UX changes have been made in this release.

- The following fields are added to the **Price Calculation** FastTab of the **Applied Sales Price and Discount** page associated with the **Blanket Sales Order**, **Sales Quote**, **Sales Order**, **Sales Order Achieve**, **Sales Invoice**, **Posted Sales Invoice**, **Sales Return Order**, **Sales Credit Memo**, and **Posted Sales Credit Memo** pages.
 - Weight Recalculation Factor
 - Unit Price (Converted) by Weight Factor
 - Discount Value (Converted) by Weight Factor

Note

These fields are displayed only when the Aptean [Catch Weight](#) extension is installed.

- The following fields are added to the **Applied Trade Lines** FastTab of the **Applied Sales Price and Discount** page associated with the **Blanket Sales Order**, **Sales Quote**, **Sales Order**, **Sales Order Achieve**, **Sales Invoice**, **Posted Sales Invoice**, **Sales Return Order**, **Sales Credit Memo**, and **Posted Sales Credit Memo** pages.
 - Base Discount Value
 - Discount Amount from Trade Lines

Note

The **Applied Trade Lines** FastTab and the associated fields are displayed only when the Aptean [Trade Management](#) extension is installed.

- The **Unit Price in Sales Line** field is removed and replaced with the **Unit Price (Converted)** field on the **Price Calculation** FastTab of the **Applied Sales Price and Discount** page.



- The **Discount Value** field is removed and replaced with the **Discount Value (Converted)** field on the **Price Calculation** FastTab of the **Applied Sales Price and Discount** page.

For more information, see [Information about the applied sales price and discount](#).



2405.4.0.0

Release Note • 8/21/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, modifications have been made to accommodate the following changes:

- Procedures have been removed to streamline the permission management and enhance the upgrade process. The *OnUpgradePerCompany* and *OnValidateUpgradePerCompany* triggers manage upgrades per-company basis, reducing complexity and enhancing performance. This refactoring eliminates redundant and unnecessary procedures, leading to a more efficient and optimized upgrade process.

 Note

This release has been implemented in correlation with the enhancement made in version [2405.1.0.0](#).

- Enhancements have been made to update the process within the application to handle the *User Group* and *User Group Permission Set* tables. This change ensures compatibility with current and future versions of Business Central, even when the *User Group* and *User Group Permission Set* tables are deprecated.

 Note

The *User Group* and *User Group Permission Set* tables are deprecated in Business Central, version 25.



2405.3.0.0

Release Note • 8/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
224130	The system fails to update the Direct Unit Cost Excl. VAT field on the Purchase Invoice page when the Applied Direct Unit Cost field value is changed. Additionally, the system does not update the Direct Unit Cost Excl. VAT field when the Direct Unit Cost field is modified using the Manual Price action on the Change Applied Direct Unit Cost dialog.



2405.2.0.0

Release Note • 5/30/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
207674/200422	An error occurs upon executing the Get Shipment Lines action on the Sales Invoice page, and the system fails to display the appropriate value in the Applied Unit Price field on the Lines FastTab.



2405.1.0.0

Release Note • 5/24/2024 • 1 min read

Enhancements/Modifications

Modifications were made for the Aptean Advanced Pricing extension to accommodate the following changes:

- Procedures were added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a **per-company** and **per-database** basis.
- Application Area Refresh: Updates were implemented to improve the application area refresh process by integrating a new procedure into the **Enable** codeunit.
- Improved Management of Install and Upgrade Code: The **Install** and **Upgrade** code units were updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized License Management Procedures: The existing license management codeunit was modified to use centralized license management procedures, further reducing the need for application-specific adjustments.



2405.0.0.0

Release Note • 5/15/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. With this release, you can view the updated **Unit Price Excl. Tax** and **Line Discount %** field values associated with the sales line, where the **Price Calculation Method** is set as *Advanced Pricing*. To know more, see [What's new in version 2404.0.0.0](#).



2404.1.0.0

Release Note • 5/14/2024 • 1 min read

Enhancements/Modifications

The Swedish translation files have been updated with standard texts for better readability



2404.0.0.0

Release Note • 4/17/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Contract Management extension. To know more, see [What's new in version 2402.0.0.0](#).



2403.1.0.0

Release Note • 4/17/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Catch Weight extension. To know more, see [What's new in version 2402.1.0.0](#)

Resolved issues

The following issue has been resolved in this release:

ID	Description
187912	Upon executing the Get Shipment Lines action on the Sales Invoice page, the system inherits the price from the price list rather than the value manually defined on the Sales Order page.



2403.0.0.0

Release Note • 4/3/2024 • 1 min read

Features

With this release of the Aptean Advanced Pricing extension, the **Sales Return Order** and **Sales Credit Memo** created from the **Sales Claims** or **Posted Sales Order** inherit the values from the **Applied Sales Price and Discount** and the **Document Trade Lines** appropriately.



2402.3.0.0

Release Note • 3/22/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
182429	The system's customization affects sales line status, leading to loss of global variables and impacting manual price application on Released Sales Orders .



2402.2.0.0

Release Note • 3/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
182422	When modifying the Applied Direct Unit Cost field value of an item on the Blanket Purchase Order, the system fails to update the new cost and retains the original value specified on the Purchase Order.



2402.1.0.0

Release Note • 3/7/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the issues arising from the indirect permission set have been effectively resolved to ensure the seamless functionality of the extension.

Resolved issues

The following issue has been resolved in this release:

ID	Description
175514	Incorrect language translations for specific terms within the French language code (fr-FR).



2402.0.0.0

Release Note • 3/6/2024 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Fresh Bridge extension. To know more, see [What's new in version 2402.0.0.0](#).



2401.0.0.0

Release Note • 2/26/2024 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Contract Management extension. To know more, see [What's new in version 2401.0.0.0](#).



2302.0.0.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Pricing Matrix extension. For more information, see [Highlights of version 2301.0.0.0](#).



2301.3.0.0

Release Note • 12/12/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
154270	The performance issue occurs due to the constant validation of the Sales Line Update Influence field on the Advanced Pricing Setup page.



2301.2.0.0

Release Note • 12/6/2023 • 1 min read

Enhancements/Modifications

The translation files have been updated to provide precise translations for field labels, tooltips, and other interface elements, resulting in improved accuracy and an enhanced user experience.



2301.1.0.0

Release Note • 10/17/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the following extensions:

- Aptean [Reporting](#)
- Aptean [Claims](#)

To know more, visit the respective links.



1.14.119061.0

Release Note • 9/20/2023 • 1 min read

Features

With this release of the Aptean Advanced Pricing extension, you can modify the Sales/Purchase unit price/cost and discount values directly on the sales or purchase order lines. To know more, see [Advanced Pricing Setup](#).

UI/UX changes

The following UI/UX changes have been made in this release:

- The **Advanced Pricing Setup** page has been added.
- The following fields are added to the Sales Order lines, Sales Quote and Sales Blanket Order, and are made available on the lines by personalization:
 - **Applied Price Unit of Measure Code**
 - **Applied Unit Price**
 - **Applied Discount Method**
 - **Applied Discount Value**
 - **Applied Discount Unit of Measure Code**
- The following fields are added to the Purchase Order lines, Purchase Quote, and Purchase Blanket Order, and are made available on the lines by personalization:
 - **Applied Price Unit of Measure Code**
 - **Applied Direct Unit Cost**
 - **Applied Discount %**
 - **Applied Discount Unit of Measure Code**



1.13.116148.0

Release Note • 9/6/2023 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, you can:

- Recreate the sales lines based on the price group and discount group defined in the header level.
- Update the existing price group and discount groups of the sales header associated with the defined address.



1.12.115164.0

Release Note • 8/31/2023 • 1 min read

Enhancements/Modifications

The translation file for the Swedish language code (sv-SE) has been updated to provide precise translations for field labels, tooltips, and other interface elements, resulting in improved accuracy and an enhanced user experience.



1.12.104941.0

Release Note • 12/6/2023 • 1 min read

Resolved issues

The following issue has been resolved in the release:

ID	Description
120770	When the Manual Discount action is used to update the Discount Value field on the Applied Sales Price and Discount page of the selected Sales Order , the existing record on the Document Trade Lines is deleted.



1.11.93546.0

Release Note • 6/22/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to work seamlessly with the Aptean Catch Weight extension. To know more, see [What's new in version 3.1.93082.0](#).



1.10.93063.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to work seamlessly with the Aptean Catch Weight extension. To know more, see [What's new in version 3.1.93082.0](#).



1.10.92682.0

Release Note • 12/6/2023 • 1 min read

Features

With the features added in this release, you can Integrate the Aptean Advanced Pricing extension with the Aptean [Advanced Attributes](#) extension to select the price on the purchase or sales price list lines based on the attribute values of an item. When the **Attribute Driven Pricing** toggle on the Sales and Purchase Price List page is turned on, you will view the global lot attributes and location code. To know more, see [here](#) .

UI/UX changes

The **Attribute Driven Pricing** toggle is added on the **Sales Price List** and **Purchase Price List** pages. If the Aptean Advanced Attributes extension is installed, you can view the global lot attributes and location code fields on the sales and purchase lines. For more information, see [Visibility of Global Lot Attributes](#).



1.10.91830.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made to this extension to work seamlessly with the Aptean [Excise Duty](#) extension. You can now calculate the price and discount for excise items in the sales and purchase documents by selecting the *Advanced Pricing* option in the **Price Calculation Method** field on Customer/Vendor page.



1.9.80814.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Grower Return extension. To know more, see [Highlights of version 1.0.80944.0](#)



1.8.76923.0

Release Note • 12/6/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
87613	If the string length of Customer Discount Group field is more than 10, then the Line Discount % is not updated in the sales order line.



1.7.65829.0

Release Note • 12/6/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
52478	When Super Permission and Indirect Permission are set for all the Apps for the user, an error occurs while accessing the Lines FastTab on the Sales Order page.
60116	In the Price Calculation Method field, the <i>Food Pricing</i> option is present on the Vendors, Customers, Sales and Purchase documents.



1.6.63626.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made to seamlessly work with the Aptean Trading Board extension. To know more, see [Highlights of version 1.0.66835.0](#)



1.5.53922.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made

- To keep our apps in line with the *updated* coding guidelines for Business Central.
- To seamlessly work with the Aptean [Reporting](#) extension, which provides easy-to-read Sales and Manufacturing reports. These reports can be printed or saved as a file.



1.49678.0

Release Note • 12/6/2023 • 3 min read

Features

The term **Food Pricing** has been changed to **Advanced Pricing**.

Purchase Pricing

Previously, Advanced Pricing was only applied to the sales documents, with this release Advanced Pricing is now available for Purchase Prices and Discounts.

To determine the Purchase Prices and Discounts for items in all available purchase documents, a calculation method called the **Advanced Pricing** is applied.

Several enhancements in relation to **Purchase Prices and Discounts** are applied in this release. For more information, see [Purchase Prices and Discounts](#).

Advanced Pricing calculation method

You can apply the purchase price calculation based on the Advanced Pricing method when entering a purchase line for an item in all available purchase document types. For more information, see [Advanced pricing calculation method](#).

Applied purchase price and discount

The **Applied Purchase Price and Discount** page shows purchase & discount related data for all the different Purchase Documents. See [Information about the applied purchase price and discount](#).

Manually change purchase price and discount

The purchase price, purchase discount or any purchase characteristic can be varied from the value based on system setup to a value chosen by the purchaser. You can keep track on such manual changes of purchase prices and discounts when using Advanced Pricing.

For more information, see [Manually change purchase price and/or discount](#).

Freeze and unfreeze purchase price and discount

After changing the purchase price and/or discount manually, the purchase line is automatically set to **Frozen**. The purchase price and/or discount can be changed by selecting the **Unfreeze** function. For more information, see [Freeze purchase price and discount](#).

Copy and Correct functions



The **Applied Purchase Price and Discount** page gives insight in the source of a purchase price and discount in the Purchase Order.

When receipt lines are retrieved in a Purchase Invoice, the person creating the Purchase Invoice should get the same insights as this can be relevant within the invoicing process. The **Copy** function is used for copying the information from the Purchase Order to the Purchase Invoice.

The **Correct** function on the posted purchase invoice performs two operations:

First, a Purchase Credit Memo is created that exactly reverses everything that was posted in the Purchase Invoice.

Second, a new Purchase Invoice is created so the user can quickly register corrected quantities or prices.

In both cases, the Applied Purchase Price and Discount lines that were linked to the Posted Purchase Invoice, should be copied to the documents mentioned above.

The copy and correct function also work when you post the purchase document. These functions also apply to the archived and posted documents.

For more information, see [Copy and Correct functions in Purchase Documents](#).

Archived and Posted Purchase documents

The **Applied Purchase Price and Discount** page shows purchase & discount related data for the different Archived and Posted Purchase Document types. For more information, see [Archived documents – Purchase and Posted Purchase Invoice](#).

Resolved issues

The following issue has been resolved in this release:

ID	Description
32951	The Quantity Expressed in BOX and Quantity Expressed in the UOM fields are not editable when creating new Item Units of Measure.



1.3.46580.0

Release Note • 5/29/2023 • 1 min read

Enhancements/Modifications

A localized version of Advanced Pricing extension is made available for the Switzerland market with the addition of German language code [de-CH].



Introduction

Article • 4/3/2023 • 7 min read

Sales

The Aptean Advanced Pricing (APR) extension makes it possible to determine sales prices and discounts for items based on a predefined hierarchy instead of the lowest price. For instance, you may have set a low sales price for all customers and a second-higher sales price for a specific customer. In this case, you want the system to collect the customer price because specific agreements have been made with it. By default, Microsoft Dynamics 365 Business Central chooses the lowest price, which is the lowest permissible price with the highest permissible line discount on a given date. The Advanced Pricing extension allows us to determine the pricing per customer, per customer price group, or the whole company if the prices and discounts must be based on a predefined hierarchical structure instead of the standard lowest price determination. When this hierarchical determination is used by setting up the **Advanced Pricing** as the price calculation method, the system searches for valid prices in the following order when an item is entered in a sales document:

1. Campaign & item
2. Customer & item
3. Customer price group & item
4. All customers & item
5. Item card

If a valid price is found, that price is considered, and the system will no longer search for prices at the levels lower in the hierarchy. The same hierarchy is considered to determine sales discounts, but extra levels have been added due to the available setup for item discount groups.

The system first looks for a valid price or discount where the currency code is equal to the sales document and where the variant matches the item on the sales price line. If there is no applicable price (or discount) found on one of the hierarchical levels, the system goes through the hierarchy again, but then with currency and/or variant code empty. This aspect is explained in detail in the [Advanced pricing method hierarchy](#).

This extension also offers other functionality besides the hierarchical price and discount determination. In the industries, especially when you sell to retail, it is common to use discounts expressed in percentages and amounts. By default, it is only possible to express sales discounts in percentages in Dynamics 365 Business Central. The extension makes it possible to set up and calculate the sales discounts in an amount as well. Those amounts are only applied if the "Advanced Pricing" method is used in the sales price line as the price calculation method instead of the lowest price method.

To provide the user with detailed insight into the sales and discount calculation based on the *Advanced Pricing method*, the **Applied Sales Price and Discount** page can be opened from a sales price line. It shows information concerning the origin of the applied sales price or discount line and the used item units of measure. It explains how the applied unit price from the sales price line is converted into the unit price on the sales price line. This is done



considering that the unit of measure code and the currency code from the applied sales price line can differ from the codes on the sales price line. The same explanation is shown if the unit price in the sales price line is expressed, including VAT, whereas the unit price on the sales price line is expressed excluding VAT or vice versa.

Insights in Applied Sales Price and Discount are available in all sales documents, including Blanket Sales Order, Sales Quote, Sales Order, Sales Return Order, Sales Invoice and Sales Credit Memo. When standard functions in Business Central such as Copy Document, Get Posted document lines to reverse, Archive document is executed, the sub administration of Applied Sales Prices and Discount are copied from the original to the new document.

You can also find the applied sales price and discount fields on the sales document lines, which are editable based on the configuration on the Advanced Pricing Setup page. These fields are not available by default on the sales document lines. You must personalize them. For more information, see [With Allow Direct Sales Line Price Influence toggle turned on](#).

Furthermore, the extension offers multiple tools for flexible deployment of sales pricing strategies:

- Apply the same pricing strategy to multiple customers simultaneously by introducing a reference customer to register sales prices and discounts.
- Differentiate pricing strategies for various locations of one customer by defining pricing parameters on the ship-to address level.
- Define reference dates used for pricing (order date, shipment date, and delivery date) on customer level.

The Advanced Pricing extension functionality is seamlessly integrated with all the sales pricing functions available in standard Business Central.

Purchase

The Aptean Advanced Pricing extension makes it possible to determine purchase prices and discounts for items based on a predefined hierarchy instead of choosing the lowest price.

For instance, you may have need to set a low purchase price for all vendors and a second-higher purchase price for a specific vendor. In this case, you want the system to collect the vendor price because specific agreements have been made with it.

By default, Microsoft Dynamics 365 Business Central chooses the lowest price, which is the lowest permissible price with the highest permissible line discount on a given date. The Advanced Pricing extension allows us to determine the pricing:

- Per vendor
- For All Vendors
- Per Item

If the prices and discounts can be based on a predefined hierarchical structure instead of the standard lowest price determination. When this hierarchical determination is used by setting up the *Advanced Pricing method* as the price



calculation method, the system searches for valid prices in the following order when an item is entered in a purchase document:

- Vendor & item
- All Vendors & item
- Item card

If a valid price is found, that price is considered, and the system will no longer search for prices at the levels lower in the hierarchy. The same hierarchy is considered to determine purchase discounts, but extra levels have been added due to the available setup for item discount groups.

The system first looks for a valid price or discount where the currency code is equal to the purchase document and where the variant matches the item on the purchase price line. If there is no applicable price (or discount) found on one of the hierarchical levels, the system goes through the hierarchy again, but then with currency and/or variant code empty. This aspect is explained in detail in the [Advanced pricing method hierarchy](#).

To provide the user with detailed insight into the purchase and discount calculation based on the *Advanced Pricing method*, the **Applied Purchase Price and Discount** page can be opened from a purchase price line. It shows information concerning the origin of the applied purchase price or discount line and the used item units of measure. It explains how the applied direct unit cost from the purchase price line is converted into the direct unit cost on the purchase price line. This conversion is done considering that the unit of measure code and the currency code from the applied purchase price line can differ from the codes on the purchase price line. The same explanation is shown if the direct unit cost in the purchase price line is expressed, including VAT, while the direct unit cost on the purchase price line is expressed excluding VAT or vice versa.

Insights in Applied Purchase Price and Discount are available in all purchase documents, including Blanket Purchase Order, Purchase Quote, Purchase Order, Purchase Return Order, Purchase Invoice and Purchase Credit Memo. When standard functions in Business Central such as Copy Document, Get Posted document lines to reverse, Archive document is executed, the sub administration of Applied Purchase Prices and Discount are copied from the original to the new document.

You can also find the applied purchase cost and discount fields on the purchase document lines, which are editable based on the configuration on the Advanced Pricing Setup page. These fields are not available by default on the purchase document lines. You must personalize them. For more information, see [With Allow Direct Purchase Line Cost update toggle turned on](#).

The Advanced Pricing extension functionality is seamlessly integrated with all purchase pricing functions available in standard Business Central.



Setup

Article • 10/24/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [General setup](#)
- [Set up advanced pricing](#)



Manage permission sets

Article • 10/24/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *ADVANCEDPRICINGFDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets to allow you to perform certain actions. These permissions typically involve additional conditions or approvals before the action can be completed.

The indirect permission set ID for this extension is *ADVPRICINGBASICFDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see [Assign permissions to users and groups](#).

Assign a permission set



1. Select the Search icon , enter **Users**, and then choose the related link.

The **Users** list page opens.

2. Navigate to the username for which you want to assign the permission set and select it.

The **User Card** page opens.



3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.

The associated fields are automatically updated based on the entered value.

The user has the necessary permissions to use the features of the Aptean Advanced Pricing extension, ensuring secure and role-based access.



General setup

Article • 7/30/2025 • 44 min read

Depending on the price calculation method, the Sales Price and Sales Discount in the sales document and Purchase Price and Purchase Discount in the purchase document are determined with the standard best price or lowest price method or the Advanced pricing method. The Advanced pricing method uses hierarchical determination for selecting a valid price and discount for an item. This hierarchy is explained in the [Advanced pricing method hierarchy](#). Changing the price calculation method to the Advanced pricing makes it possible to use other functionality added with this extension, such as sales discounts expressed in amounts.

Advanced pricing calculation method

The advanced price calculation method can be set up at three levels in the following order:

For sales pricing

- Sales & Receivables Setup
- Customer Price Groups or
- Customer card.

For purchase pricing

- Purchase & Payables Setup
- Vendor card

The method that is set at the lowest level surpasses the method(s) set at a higher level(s).

Sales & receivables setup

The Advanced pricing method can be set as the default method to use throughout the whole system for every sales transaction with an item by selecting **Advanced Pricing** in the **Sales & Receivables Setup**.



1. Select the Search icon , enter **Sales & Receivables Setup**, and then choose the related link.
2. On the **Prices** FastTab, in the **Price Calculation Method** field, select the **Advanced Pricing** option from the list.



 Note

- i) The **Price Calculation Method** field is not visible by default. You can add the field through personalization.
- ii) When you receive an error while changing the **Price Calculation Method** field value to *Advanced Pricing*, open the **Price Calculation Methods** to resolve it. This will add the *Advanced Pricing* to the page if it was not added during the installation of the extension.

The **Sales & Receivables Setup** is now set up with **Advanced Pricing** as the Price Calculation Method.

Customer price group

If the Advanced Pricing method is not selected in the Sales & Receivables Setup, it is still possible to set the Advanced Pricing method as default for a specific customer price group assigned to one or more customers.



1. Select the Search icon  , enter **Customer Price Groups**, and then choose the related link.
The **Customer Price Groups** page opens.
2. Enter **Code**.
3. Enter **Description**.
4. Click the **Price Calculation Method** field.
5. Select the **Advanced Pricing** option from the list.

The customer price group is now set up with *Advanced Pricing* as the Price Calculation Method. This group can be assigned to one or more customers.

The system automatically inherits the **Sales Price Reference Date** and **Sales Price Reference Customer** field values on the **Customer Template** page from the **Customer Card** page. Additionally, you can manually select the field values.

Customer

Another option to deviate, is to fill the Price Calculation Method with the *Advanced Pricing* on the specific Customer Card.



1. Select the Search icon  , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. Click the preferred **No.** on the Customers list to open the **Customer Card** page.



3. On the **Invoicing** FastTab, click the **Price Calculation Method** field.

4. Select the **Advanced Pricing** option from the list.

Purchase & Payables Setup

The Advanced Pricing method can be set as the default method to use throughout the whole system for every purchase transaction with an item by selecting **Advanced Pricing** in the **Purchases & Payables Setup**.



1. Select the Search icon , enter **Purchases & Payables Setup**, and then choose the related link.

2. On the **Prices** FastTab, click the **Price Calculation Method** field.

3. Select the **Advanced Pricing** option from the list.

The **Purchases & Payables Setup** is now set up with *Advanced Pricing* as the Price Calculation Method.

Vendor

Another option to deviate, is to fill the Price Calculation Method with *Advanced Pricing* on the specific Vendor Card.



1. Select the Search icon , enter **Vendors**, and then choose the related link.

The **Vendors** list page opens.

2. Click the preferred **No.** on the Vendors list to open the **Vendor Card** page.

3. On the **Invoicing** FastTab, click the **Price Calculation Method** field.

4. Select the **Advanced Pricing** option from the list.

Reference date, reference customer and ship-to address

The reference date and reference customer only work when the customer (or customer price group) is set up with the Price Calculation Method as *Advanced Pricing*, or when the *Advanced Pricing* method is set up as general pricing method in the **Sales and Receivables Setup** page.

Reference date

Depending on the type of business a company is in, the pricing strategy can differ substantially. The date that should be used to determine a sales price and discount can vary accordingly. In many cases, the date that a sales order was registered, is the date that the price is set by the salesperson. In businesses where market value (purchase- and sales prices) are constantly fluctuating, the exact moment of shipment or promised/requested



moment of delivery may be used to determine the price and discount. Therefore, it is possible to set this **Sales Price Reference Date** per customer, ensuring that sales price determination in the sales order is as exact as possible. The reference date is always picked from the Bill-to customer in the sales document.



1. Select the Search icon , enter **Customers**, and then choose the related link.

The **Customers** list page opens.

2. Click the preferred **No.** on the **Customers** list to open the **Customer Card** page.

3. Click the **Sales Price Reference Date** field on the **Invoicing** FastTab.

4. Select a date option from the dropdown list.

Note

The system automatically updates the **Sales Price Reference Date** field value on the **Customer Template** page. This value is inherited from the **Sales Price Reference Date** field on the **Customer Card** page, and you can also manually select the field value.

The reference date is only used to determine the sales price and discount for an item in a sales order with the price calculation method set to *Advanced Pricing*. All other sales document types apply the standard date. To know more on how reference dates are used in the sales process, see [Apply different reference dates](#).

Reference customer

In some cases, it is preferable that pricing for a particular customer is set up on a higher level than the individual customer. For example, for a group of retail customers, a single set of prices may exist. In such a scenario, it is unfavorable to have to register prices for each customer belonging to this group. It can also be unfavorable to use the customer price group because the specific customer price surpasses the prices set at the customer price group level.

To create a maintainable set of prices, it should be possible to define prices for a *dummy customer* that is referred to on the customer cards of the customers belonging to the group. This way, it can be chosen via setup, if prices are registered on the customer itself, or on a reference customer, possibly linked to multiple other customers.

1. Click the **Sales Price Reference Customer** field on the **Customer Card** page on the **Invoicing** FastTab.
2. Select and click the required **No.** to choose a customer.



 Note

The system automatically updates the **Sales Price Reference Customer** field value on the **Customer Template** page. This value is inherited from the **Sales Price Reference Customer** field on the **Customer Card** page, and you can also manually select the field value.

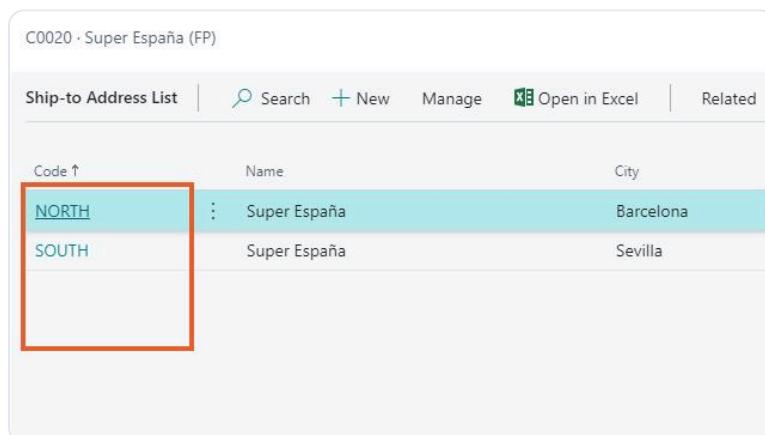
The selected customer number will be used in the sales document to search for the valid price and discount. The reference customer is only used to determine the sales price and discount for an item in a sales order with Price Calculation Method set to Advanced Pricing.

All other sales document types apply the Bill-to customer by default. To know more on how reference customers are used in the sales process, see [Using Reference customers for pricing](#).

Ship-to address

In some cases, prices can differ for one customer depending on the ship-to address for that specific customer. If a large customer has offices/warehouses across the country (say region North and South), prices may differ between these regions due to transportation costs. Hence, the system supports the sales process in these ship-to address specific sales prices by selecting a different customer price - and/or discount group on the ship-to address than on the customer card. The customer price - and discount group on ship-to addresses only work when the customer is set up with the price calculation method set to *Advanced Pricing*, or when the Advanced Pricing method is set up as general pricing method in the sales and receivables setup.

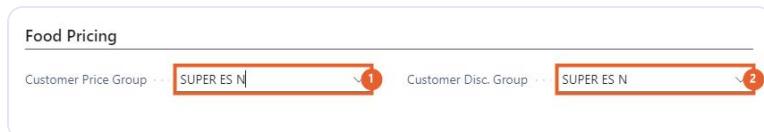
1. On the **Customer Card** page, on the action bar, click **More options > Related > Customer > Ship-to Addresses**. The **Ship-to Address List** page opens.



C0020 - Super España (FP)		
Code ↑	Name	City
NORTH	Super España	Barcelona
SOUTH	Super España	Sevilla

2. Select and click the required **Code**.
3. The Ship-to Address can now be set up with a different **Customer Price Group** than selected on the customer card.





4. The Ship-to Address can now be set up with a different **Customer Disc. Group** than selected on the customer card.

The setup is now completed.

To know more on how ship-to address specific prices and discounts are used in the sales process, see [Using ship-to address specific customer price group and customer discount group for pricing](#).

Sales prices and discounts

This section explains how to set up and maintain sales prices and discounts for items. The sales prices and discounts can be opened from both the item card and the customer card because sales prices are based on a combination of item and customer setup.

Sales prices

In industries, especially when you sell to retail, it is common to use sales prices based on an agreement with a customer (group). In previous Business Central versions, you could insert the sales price directly into a customer card or item card. In the current version, you need to create a sales price list and then link it. You can have a specific sales price inserted on a sales price line if a certain combination of customer, item, minimum quantity, unit of measure, or starting/ending date exists. The sales prices can be opened from the customer card and item card.



1. Select the Search icon , enter **Customers**, and then choose the related link.

The **Customers** list page opens.

2. On the action bar, click **Related > Prices and Discounts > Sales Price Lists** to open the **Sales Price Lists** page.
3. On the action bar, click **New** to open the **Sales Price List** page.
Note that it is necessary to create a price list before actual prices for items can be registered.
4. On the **General** FastTab, enter **Code** to identify the price list, e.g., "PL-0024".
5. Enter **Description**, e.g., "New Price List Super Heerlen".
6. In the **Assign-to Type** field, select the required type from the following options.

Options	Description
All Customers	Specifies that the Sales Price List is applicable to all existing customers.



Customer	Specifies that the Sales Price List is applicable to a particular customer.
Customer Price Group	Specifies that the Sales Price List is applicable to a specified customer price group.
Customer Disc. Group	Specifies that the Sales Price List is applicable to a specified customer discount group.
Campaigns	Specifies that the Sales Price List is applicable to a specified campaign.
Contact	Specifies that the Sales Price List is applicable to a specified contact.

7. Enter **Assign-to No.** based on the selected **Assign-to Type**.

This field is disabled when the **Assign-to Type** is set to *All customers*.

8. Click the **View Columns for** field.

Review the **View Columns for** field. By default, the field is set to option **Price & Discount**, meaning that both Unit Price and Discount % can be filled on the line level.

You can change this to suit your preference, for example, if you want the price list only to contain unit prices, change its value to **Price**.

9. Select **Price** in the **View Columns for** field.

10. Enter **Currency Code**, if necessary. Enter the currency code only if the price list is setup in any currency other than the local currency.

11. Enter **Starting Date** from which the price is valid.

12. Enter **Ending Date**, if required to specify the date until which the price is valid.

13. On the **Lines** FastTab, click on the field **Product Type**.

14. Select the option **Item** from the dropdown list.

15. Enter **Product No.**

16. Enter **Unit Price**.

17. Select the **Allow Line Disc.** checkbox.

When the **Allow Line Disc.** checkbox is selected, it will allow you to apply any additional line discounts to the unit price, if they are set up for the combination of customer and item.

18. Click the **Status** field on the **General** FastTab.

19. Select the **Active** option to set the price list to the **Active** status.

20. Click on **Yes** in the dialog box to confirm the status change.

 **Note**

You can also access the **Sales Price Lists** from **Campaign Card** by selecting **Prices & Discounts > Sales Price Lists** on the action bar of the campaign card.



You can view the prices for a specific item from the **Item Card** page by selecting **Prices & Discounts > Sales Price** on the action bar to access the Price List Lines page.

You can view the prices directly from the overview. The Price List Code of the related item is highlighted and you can view its Unit Price along with other details. The Assign-to field specifies the entity name to which the prices are assigned. The options depend on the selection in the Assign-to Type field. If you choose an entity, the price list will be used only for that entity.

Optionally, you can open a specific price list by clicking it to view the items and prices available in it.

The setup of a sales price list via the menu is now complete.

The description for the fields on the **Sales Price List** is as follows:

On the **General** FastTab:

Field	Description
Code	Specifies the price list to which this sales price line belongs.
Assign-to Type	Specifies the type of source this price line applies to. One of the following options can be selected: All Customers , Customer , Customer Price Group or Campaign .
Assign-to	Specifies the number or the code of the source to which this price line applies.
VAT Bus. Posting Gr. (Price)	Specifies the code for the VAT business posting group of the customer.
Price Includes VAT	Specifies if the unit price includes VAT.
Status	Specifies the status of the sales price list.
Currency Code	Specifies the currency in which the unit price is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.
Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.
Line Defaults	Specifies the default behavior of Allow Invoice Disc. and Allow Line Disc. fields. These checkmarks apply to all lines in the price list by default.

On the **Lines** FastTab:

Field	Description
Product Type	Specifies the type of the item to which the price line applies. The logic as described in extension APR only applies to price list lines of type Item and/or Item Discount group.



Product No.	Specifies the number of the item to which the price line applies.
Description	Specifies item details.
Variant Code	Specifies the item variant to which this price line applies
Unit of Measure Code	Specifies the unit of measure of the item
Minimum Quantity	Specifies the minimum quantity required in a sales line for this price line to be valid. The minimum quantity is expressed in the unit of measure of this line
Unit Price	Specifies the sales price of the item/variant expressed in the unit of measure of this line
Cost Factor	Specifies the unit cost factor as agreed with the customer
Allow Line Disc.	Specifies if a possible available line discount may be subtracted from the unit price of this price line.
Allow Invoice Disc.	Specifies if a possible available invoice discount may be subtracted from the unit price of this price line

Sales discounts

Similar to sales prices, sales discounts can be set up via the customer card or via the menu if discounts apply to "All customers" for example. In this scenario, we create a Sales Discount List for a particular customer.



1. Select the Search icon  , enter **Customers**, and then choose the related link.
2. Select and click the required **No.** to open the **Customer Card** page.
3. On the action bar, click **Related > Prices and Discounts > Sales Price Lists**.
4. On the action bar, click **New** on the **Sales Price Lists** page to open the **Sales Price List** page.
5. On the **General FastTab**, enter **Code** to identify the discount list, e.g., "PL-0034".
6. Enter **Description**, e.g., "New Discount List Super Heerlen".
7. Enter **Currency Code**, if necessary.
8. Enter **Starting Date** from which the discount is valid.
9. Enter **Ending Date**, if required to specify the date until which the discount is valid.
10. On the **Lines** FastTab, click the **Product Type** field.
11. Select the **Item** option from the dropdown list.
12. Enter **Product No.**.
13. Click the **Discount Method** field.



14. Select the required method from the options, **Percentage** and **Amount**. For example, **Percentage**.

15. Enter **Discount Value**, e.g., "8.00".

In case discount method **percentage** is chosen, the discount value registered represents a percentage over the unit price. If the discount method **Amount** is chosen, the discount value registered represent an absolute amount as a combination of the unit of measure and currency of the price list line.

16. Click the **Status** field on the **General** FastTab.

17. Select the **Active** option to set the price list to the **Active** status.

18. Click **Yes** in the dialog box to confirm the status change.

The setting up of a sales discount list via the customer card is now complete.

In the above example, a price list of type discount was set up for a specific customer. It is also possible to create a price list of type discount for **All customers**. This is done via the menu.



1. Select the Search icon , enter **Sales Price Lists**, and then choose the related link.

The **Sales Price Lists** page opens.

2. On the action bar, click **New** to open the **Sales Price List** page.

3. On the **General** FastTab, enter **Code** to identify the price list, e.g., "PL-0038".

4. Enter **Description**, e.g., "New Discount List".

5. In the **Assign-to Type** field, select the required type, e.g., *All customers*.

6. Enter **Assign-to** based on the selected **Assign-to Type**.

Note

This field is disabled when the **Assign-to Type** is set to *All customers*.

7. Click on the **View Columns for** field.

Review the **View Columns for** field. By default, the field is set to option **Price & Discount**, meaning that both Unit Price and Discount % can be filled on the line level. You can change this to suit your preference, for example, if you want the price list only to contain discounts, change its value to **Discount**.

8. Select **Discount** in the **View Columns for** field.

9. Enter **Currency Code**, if necessary. Enter the currency code only if the price list is set up in any currency other than the local currency.

10. Enter **Starting Date** from which the discount is valid.

11. Enter **Ending Date**, if required to specify the date until which the discount is valid.

12. On the **Lines** FastTab, click the **Product Type** field.

13. Select the option **Item** from the dropdown list.



14. Enter **Product No.**
15. Click the **Discount Method** field.
16. Select the required method from the options, *Percentage* and *Amount*. For example, *Percentage*.
17. Enter **Discount Value**, e.g., "1.00".
18. Click the **Status** field on the **General** FastTab.
19. Select the **Active** option to set the price list to the **Active** status.
20. Click **Yes** in the dialog box to confirm the status change.

The setup of a sales discount list via the menu is now complete.

The description for the fields on the **Sales Price List** page are as follows:

On the **General** FastTab:

Field	Description
Code	Specifies the price list to which this sales price line belongs.
Assign-to Type	Specifies the type of source this price line applies to. One of the following options can be selected: All Customers , Customer , Customer Price Group or Campaign .
Assign-to	Specifies the number or the code of the source to which this price line applies.
VAT Bus. Posting Gr. (Price)	Specifies the code for the VAT business posting group of the customer.
Price Includes VAT	Specifies if the discount includes VAT.
Status	Specifies the status of the sales price list.
Currency Code	Specifies the currency in which the unit price is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.
Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.
Allow Line Disc.	Specifies if a possible available line discount may be subtracted from the unit price of this price line.
Allow Invoice Disc.	Specifies if a possible available invoice discount may be subtracted from the unit price of this price line

On the **Lines** FastTab:



Field	Description
Product Type	Specifies the type of the item to which the price line applies. The logic as described in extension APR only applies to price list lines of type Item and/or Item Discount group .
Product No.	Specifies the number of the item to which the price line applies.
Description	Specifies item details.
Variant Code	Specifies the item variant to which this price line applies
Unit of Measure Code	Specifies the unit of measure of the item
Minimum Quantity	Specifies the minimum quantity required in a sales line for this price line to be valid. The minimum quantity is expressed in the unit of measure of this line
Price Change Reason Code	Specifies the reason for the price change. This field is optional and is updated when altering prices. You can add or change codes on the Price Reason Change Codes list page.
Discount Method	Specifies whether the discount value is specified as a percentage or as an absolute amount.
Discount Value	Specifies the discount that will be granted to the sales line, expressed as a percentage or absolute amount (see the Discount Method field).

In some cases, you may wish to see what discounts exist for a specific item, regardless of a specific customer or price discount list. In that case, it is possible to view all discounts directly from the item card.



1. Select the Search icon , enter **Items**, and then choose the related link.

The **Items** list page opens.

2. Select and click the required **No.** to open the **Item Card** page.

3. On the action bar, click **Sales Prices & Discounts > Sales Prices** to open the **Price List Lines** page.

You can view the line discounts directly from the overview. The **Assign-to** field specifies the entity name to which the prices are assigned. The options depend on the selection in the **Assign-to Type** field. If you choose an entity, the price list will be used only for that entity. The **Price List Code** for discount for the related item is highlighted and you can view its **Line Discount %** along with other details.



Price List Code ↑	Product No.	Description	Unit of Measure Code	Minimum Quantity	Currency Code	Starting Date	Ending Date	Line Discount %
PL-0001	0011	Potato Gratin Deluxe	KG	0	1/1/2020	12/31/2030	0.00	
PL-0003	0011	Potato Gratin Deluxe	PCS	0	1/1/2020	12/31/2030	0.00	
PL-0004	0011	Potato Gratin Deluxe	PCS	0	1/1/2020	12/31/2020	3.00	
PL-0005	0011	Potato Gratin Deluxe	PCS	0	1/1/2020	12/31/2020	0.00	
PL-0006	0011	Potato Gratin Deluxe	PCS	0	1/1/2020	12/31/2025	5.00	
PL-0006	0011	Potato Gratin Delux...	PCS	0	1/1/2020	12/31/2025	0.00	

Optionally, you can open a specific price discount list by clicking it to view the items and discounts available in it.

Note

You can view the global lot attribute and the location code fields along the Sales Price List Line, Applied Sales Price Line, and Applied Sales Discount Line only if Aptean [Advanced Attributes](#) extension is installed and **Attribute Driven Pricing** toggle on the **Sales Price List** page is turned on.

Purchase prices and discounts

This section explains how to set up and maintain purchase prices and payables for items. You can access purchase prices and payables from both the Item card and the Vendor card as the purchase prices are based on the Item-Vendor setup combination

Purchase prices

In industries, especially when purchasing from retail vendors, it is common to use purchase prices based on an agreement with a vendor. In the previous versions of Business Central, you could insert the purchase price directly into a Vendor Card or an Item Card. However, in the current version, you need to create a vendor price list and then link it. You can have a specific vendor price inserted on a purchase line if a particular combination of vendor, item, minimum quantity, unit of measure, or starting/ending date exists. The purchase prices can be accessed from the Vendor Card and Item Card.

To set up the Purchase Price List via the Vendor Card,



1. Select the Search icon , enter **Vendors**, and then choose the related link.
The **Vendors** list page opens.
2. Select and click the required **No.** to open the **Vendor Card** page.
3. On the action bar, click **Prices & Discounts > Purchase Price Lists** to open the **Purchase Price Lists** page.
4. On the action bar, click **New** to open the **Purchase Price List** page.
Note that it is necessary to create a price list before actual prices for items can be registered.



5. On the **General** FastTab, enter **Code** to identify the price list. This code is created as per the set Number series in **Purchase & Payable Setup**, e.g., "PL-0024".
6. Enter **Description**, e.g., "New Price List Super Heerlen".
7. Enter **Currency Code**, if necessary. Enter the currency code only if the price list is setup in any currency other than the local currency.
8. Enter **Starting Date** from which the price is valid.
9. Enter **Ending Date**, if required to specify the date until which the price is valid.
10. Turn on the **Allow Updating Defaults** toggle to allow the users to change the field values on the price list line containing default values from the header.
11. Turn on the **Allow Invoice Disc.** toggle to allow the invoice discount. You can change this value on the lines only if this toggle is turned on.
12. Turn on the **Allow Line Disc.** toggle to allow line discounts. You can change this value on the lines only if this toggle is turned on.
13. On the **Lines** FastTab, click the **Product Type** field.
14. Select the option **Item** from the dropdown list.
15. Enter **Product No.**
16. Enter **Direct Unit Cost**.
Direct Unit Cost is automatically filled with the data from the existing price lists or from the Item Card. You can also enter it manually.
17. Enter **Minimum Quantity**, **Variant Code**, **Unit of Measure** and **Currency Code** to calculate the **Direct Unit Cost** automatically.
18. Select the **Allow Line Disc.** checkbox.

 **Note**

When the **Allow Line Disc.** checkbox is selected, it allows you to apply any additional line payables to the direct unit cost, if they are set up for the combination of vendor and item.

19. Select the **Allow Invoice Disc.** checkbox. [!NOTE] When the **Allow Line Disc.** checkbox is selected, the invoice discount will be calculated when the price is offered.
20. Click the **Status** field on the **General** FastTab.
21. Select the **Active** option to set the price list to the **Active** status.
22. Click **Yes** in the dialog box to confirm the status change.

The setup of a purchase price list via the vendor card is now complete.

When we select **All Vendors**, the **Assign-to** field is disabled



In some cases, you might want to view the prices for a specific item, regardless of a particular vendor or price list. It is now possible to view all prices directly from the Item Card for such scenarios.



1. Select the Search icon , enter **Items**, and then choose the related link.

The **Items** list page opens.

2. Select and click the required **No.** to open the **Item Card** page.

3. On the action bar, click **Prices & Discounts > Purchase Prices** to open the **Price List Lines** page.

You can view the prices directly from the overview. The **Price List Code** of the related item is highlighted, and you can view its **Direct Unit Cost** along with other details.

Optionally, you can open a specific price list by clicking it to view the items and prices available in it.

Purchase Price Lists

The description for the fields on the **Purchase Price List** page are as follows:

On the **General** FastTab:

Field	Description
Code	Specifies the price list to which this purchase price line belongs.
Assign-to Type	Specifies the type of entity to which the price list is assigned. The options are All Vendors and Vendor . Campaign or Contact options cannot be selected when price calculation is done using Advanced Pricing.
Assign-to	Specifies entity to which the prices are assigned. The options depend on the selection in the Assign-to Type field. If you choose an entity, the price list is used only for that entity.
Price Includes VAT	Specifies if the direct unit cost includes VAT.
View Columns for	Specifies the amount type filter that defines the columns shown in the price list lines. One of the following options can be selected: Price & Discount , Price or Discount .
Status	Specifies whether the price list is in Draft status and can be edited, Inactive and cannot be edited or used, or Active and used for price calculations.
Currency Code	Specifies the currency in which the direct unit cost is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.
Starting Date	Specifies the date from which this line is valid.



Ending Date	Specifies the date until which this line is valid.
Line Defaults	Specifies the default behavior of Allow Updating Defaults , Allow Invoice Disc. and Allow Line Disc. fields. These checkmarks apply to all lines in the price list by default.

On the **Lines** FastTab:

Field	Description
Product Type	Specifies the type of the item to which the price line applies. The logic as described in extension APR only applies to price list lines of type Item and/or Item Discount group.
Product No.	Specifies the identifier of the product. If no product is selected, the price and discount values will apply to all products of the selected product type for which those values are not specified. For example, if you choose Item as the product type but do not specify a specific item, the price will apply to all items for which a price is not specified.
Description	Specifies item details.
Variant Code	Specifies the item variant to which this price line applies.
Work Type Code	Specifies the work type code for the resource.
Unit of Measure Code	Specifies the unit of measure of the item.
Minimum Quantity	Specifies the minimum quantity required in a purchase line for this price line to be valid. The minimum quantity is expressed in the unit of measure of this line.
Defines	Specifies if the price list line defines prices, discounts, or both.
Direct unit Cost	Specifies the cost of one unit of the selected item.
Price Change Reason Code	Specifies the reason for the price change. This field is optional and is updated when altering prices. You can add or change codes on the Price Reason Change Codes list page.
Currency Code	Specifies the currency in which the direct unit cost is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.
Allow Line Disc.	Specifies if a possible available line discount may be subtracted from the direct unit cost of this price line.
Line Discount %	Specifies the line discount percentage in the purchase line.



Allow Invoice Disc.

Specifies if a possible available invoice discount may be subtracted from the direct unit cost of this price line.

Purchase Order



1. Select the Search icon , enter **Purchase Orders**, and then choose the related link.
2. On the action bar, click **New** to open the **Purchase Order** page.
3. On the **General** FastTab, in the **Vendor No.** field, select and click the required Vendor No. with Advanced Pricing.
4. On the Lines, select **Type as Item**.
5. Enter **Item No.**.
6. Enter the **Quantity**.
7. Enter the **Unit of Measure Code**.
8. The **Direct Unit Cost Excl. VAT** is entered automatically. In the **Details** FactBox, on **Purchase Line Details**, click **Purchase Prices** to see how many special prices your vendor grants you for the purchase line. Choose the value to see the special purchase prices.
9. The **Line Amount Excl. VAT** is also filled automatically.
10. The **Invoice Discount Amount** and **Total Incl. VAT** is calculated based on the lines.

You can then post the purchase order.

You can check the calculation for advanced pricing by clicking the line and then the **Applied Purchase Price** and **Discount** function.

Note

You can view the global lot attribute and the location code fields along the Purchase Price List Line, Applied Purchase Price Line, and Applied Purchase Discount Line only if Aptean [Advanced Attributes](#) extension is installed and **Attribute Driven Pricing** toggle on the **Purchase Price List** page is turned on.



Set up advanced pricing

Article • 11/4/2025 • 12 min read

You can set up advanced pricing configurations to manage pricing calculations, discounts, bracket pricing, and price freezing behaviors across sales and purchase transactions.

To set up advanced pricing, follow these steps:



1. Select the Search icon , enter **Advanced Pricing Setup**, and then choose the related link.

The **Advanced Pricing Setup** page opens.

2. On the **Sales** FastTab, enter the required information in the following fields:

Field	Description
Allow Direct Sales Line Price Update	<p>Turn on the toggle to enable direct modification of applied price and discount fields in sales order lines. This is applicable only when the Price Calculation Method field value is set to <i>Advanced Pricing</i>.</p>
Freeze Sales Price on Manual Change	<p>Select whether the system must freeze the sales line price or discount after a manual update, to prevent recalculation if the sales line quantity is subsequently edited. The available options are:</p> <ul style="list-style-type: none"> • Yes: The Freeze Price & Discount toggle on the Change Applied Unit Price and Change Applied Line Discount pages is turned on by default and is editable. When you change the price or discount directly in the document line using the Applied Unit Price, Applied Discount Value, or Line Discount Amount field value, the applied price records are automatically frozen. • No: The Freeze Price & Discount toggle on the Change Applied Unit Price and Change Applied Line Discount pages is turned off by default and is editable. When you change the price or discount directly in the document line using the Applied Unit Price, Applied Discount Value, or Line Discount Amount field, the applied price records are not automatically frozen. • Always: The Freeze Price & Discount toggle on the Change Applied Unit Price and Change Applied Line Discount pages is turned on by default and is non-editable. When you change the price or discount directly in the document line using the Applied Unit Price, Applied Discount Value, or Line Discount Amount field, the applied price records are automatically frozen.



	<ul style="list-style-type: none"> • Never: The Freeze Price & Discount toggle on the Change Applied Unit Price and Change Applied Line Discount pages is turned off by default and is non-editable. When you change the price or discount directly in the document line using the Applied Unit Price, Applied Discount Value, or Line Discount Amount field, the applied price records are not automatically frozen.
Default Applied Discount Method	<p>Select the default format for discounts. The available options are:</p> <ul style="list-style-type: none"> • <i>Percentage:</i> The applied discount is indicated in percentage. • <i>Amount:</i> The applied discount is indicated in decimal values. <p>The selected option is applied to items in the sales line if they do not have a default value from the sales price list.</p> <p>This field is available only when the Allow Direct Sales Line Price Update toggle is turned on.</p>
Sales Line Update Influence	<p>Select how unit price updates affect pricing calculations. The available options are:</p> <ul style="list-style-type: none"> • <i>Unit Price:</i> The unit price indicates that the special price applied will override all other pricing for the item. • <i>Trade Base Price:</i> The trade base price indicates that the applied unit price entered will undergo additional changes through the trade plans. <p>This option is visible only if the Aptean Trade Management extension is installed.</p> <p>This field is available only when the Allow Direct Sales Line Price Update toggle is turned on.</p>
Default Sales Price Reference Date	Select the reference date used for price calculations.

3. On the **Purchase** FastTab, enter the required information in the following fields:

Field	Description
Allow Direct Purchase Line Cost Update	Turn on the toggle to enable direct modification of applied cost and discount fields in purchase order lines.
Freeze Purchase Price on Manual Change	Select whether the system must freeze the purchase line price or discount after a manual update, to prevent recalculation if the purchase line quantity is subsequently edited. The available options are:



- **Yes:** The **Freeze Price & Discount** toggle on the **Change Applied Direct Unit Cost** and **Change Applied Line Discount** pages is turned on by default and is editable. When this toggle is turned on, and you update the price or discount directly in the document line using the **Applied Direct Unit Cost** or **Applied Discount %** field values, the applied price records are automatically frozen.
- **No:** The **Freeze Price & Discount** toggle turned on the **Change Applied Direct Unit Cost** and **Change Applied Line Discount** pages is turned off by default and is editable. When this toggle is turned on, and you change the price or discount directly in the document line using the **Applied Direct Unit Cost** or **Applied Discount %** fields, the applied price records are not automatically frozen.
- **Always:** The **Freeze Price & Discount** toggle turned on the **Change Applied Direct Unit Cost** and **Change Applied Line Discount** pages is on by default and is non-editable. When this toggle is turned on, and you update the price or discount directly in the document line using the **Applied Direct Unit Cost** or **Applied Discount %** fields, the applied price records are automatically frozen.
- **Never:** The **Freeze Price & Discount** toggle turned on the **Change Applied Direct Unit Cost** and **Change Applied Line Discount** pages is turned off by default and is non-editable. When this toggle is turned on, and you update the price or discount directly in the document line using the **Applied Direct Unit Cost** or **Applied Discount %** fields, the applied price records are not automatically frozen.

4. On the **Bracket Pricing** FastTab, enter the required information in the following fields:

Field	Description
Enable Bracket Pricing for Sales	Turn on the toggle to apply bracket pricing to sales orders, sales invoices, and sales quotes. For more information, see Manage bracket pricing .
Calculate Sales Bracket Pricing On Release	Turn on the toggle if the system must calculate bracket pricing automatically when a sales document is released. This field is available only when the Enable Bracket Pricing for Sales toggle is turned on.
Update Method for Sales Bracket Change	<p>Select how the system must update pricing in the event of threshold changes. The available options are:</p> <ul style="list-style-type: none"> • Update Only: Only the bracket pricing source type is updated on the source document. • Message Only: Displays a message indicating which record can be updated. If the document is reopened and released again without updating the source number, the message continues to appear. • Update and Message: The source number value is updated, and a confirmation message is displayed.



This field is available only when the **Enable Bracket Pricing for Sales** toggle is turned on.

 **Note**

You can select the **Bracket Pricing Groups** action to open the **Bracket Pricing Groups** page. For more information, see [Set up bracket pricing groups](#).

5. On the **Report** FastTab, in the **Price Report Template Nos.** field, select the number series to use in print report templates.

The advanced pricing setup is complete.

Working with direct sales line price updates

You can directly modify the values of the applied price and discount fields in the sales order lines. These fields can be customized through personalization. The fields are:

- Applied Unit Price
- Applied Price Unit of Measure Code
- Applied Discount Method
- Applied Discount Value
- Applied Discount Unit of Measure Code

However, the **Applied Unit Price**, **Applied Price Unit of Measure Code**, and **Applied Discount Value** field values are only editable, when

i) *Advanced Pricing* is being used as the price calculation method.

ii) The **Allow Direct Sales Line Price Influence** toggle on the **Advanced Pricing Setup** page is turned on.

The **Applied Discount Method** and **Applied Discount Unit of Measure Code** field values are not editable.

The following steps describe how to fill the fields:

1. The **Applied Unit Price** field automatically inherits the value from the **Unit Price** field in the applied sales price line. If this field is blank, then the **Applied Unit Price** field value is empty.

This is influenced by the option selected in the **Sales Line Update Influence** field on the **Advanced Pricing Setup** page: *Unit Price* or *Trade Base Price*.

a. When *Unit Price* is selected,

The entered value will update the **Unit Price** field on the **Applied Sales Price Line**, and then trigger a price update in the **Unit Price Excl. VAT** field in the sales lines. The **Currency Recalculation Factor** field value is recalculated and updated based on the value entered.



b. When *Trade Base Price* is selected,

The entered value will serve as the base price, and the trade line will be recalculated accordingly. This is possible only when the Aptean [Trade Management](#) extension is installed.

The value entered in the **Applied Unit Price** field is expressed in applied unit of measure code. If the applied unit of measure code is different from the value in the sales line, then the **Unit Price Excl. VAT** field value is recalculated internally using the unit of measure code conversion.

When you update this value in the applied sales price line through **Manual Price** action, the same values are inherited to the field in the sales order Lines.

 Note

This field is editable on the **Sales Invoice** and **Sales Credit Memo** pages.

2. The **Applied Price Unit of Measure Code** field automatically inherits the value from the **Unit of Measure Code** field in the Applied Sales Price Line. When you update this value, the **Unit Price Excl. VAT** field value also gets updated accordingly.
3. The **Applied Discount Method** field value automatically inherits the value from the **Discount Method** field on the **Applied Line Discount** page. The options are *Percentage* or *Amount*.
4. In the **Applied Discount Value** field, enter the desired decimal value.

This automatically calculates and updates the **Line Discount%** field value, similar to manually entering the discount value for the item through the **Manual Discount** action. It also updates the same value in the **Discount Value** field on the **Applied Sales Price and Discount** page.

 Note

When *Percentage* is selected, the **Discount Value** field value is inherited to the **Line Discount%** field, whereas when *Amount* is selected, the **Line Discount%** field value is internally calculated based on the value entered.

5. The **Applied Discount Unit of Measure Code** field value automatically inherits the value from the **Unit of Measure Code** field on the applied sales discount line. This is populated only after you enter the value in the **Applied Discount Value** field.

The values entered in the sales order lines for the above fields are updated automatically on the Applied Sales Price and Discount page and vice versa.

This applies to both sales quotes and sales blanket orders.



With allow direct purchase line cost update toggle turned on

You can directly modify the values of the applied cost and discount fields on the purchase order lines, and these fields can be customized through personalization. The fields are:

- Applied Direct Unit Cost
- Applied Price Unit of Measure Code
- Applied Discount %
- Applied Discount Unit of Measure Code

However, the **Applied Direct Unit Cost**, **Applied Price Unit of Measure Code**, and **Applied Discount%** field values are editable only when

- i) *Advance Pricing* is being used as a price calculation method.
- ii) The **Allow Direct Purchase Line Cost Update** toggle on the **Advanced Pricing Setup** page is turned on.

The **Applied Discount Unit of Measure Code** field value is not editable.

The following steps describe how to fill the fields:

1. The **Applied Direct Unit Cost** field automatically inherits the value from the **Direct Unit Cost** field in the applied purchase price line.

Note

If the value in the **Unit of Measure Code** and **Applied Price Unit of Measure Code** fields are the same, then the unit cost value remains the same. If they are different, on changing the **Applied Direct Unit Cost** field value, the **Direct Unit Cost Excl. VAT** field value will be internally recalculated based on the unit of measure code conversion.

When you update this value on the Applied Purchase Price line through **Manual Price** action, the same values are inherited to the field in the purchase order lines.

1. The **Applied Price Unit of Measure Code** field automatically inherits the value from the **Unit of Measure Code** field in the applied purchase price line.

When you update this value, the **Direct Unit Cost Excl. VAT** field value is also updated.

2. The **Applied Discount %** field automatically inherits the value from the **Line Discount %** field in the applied purchase discount line.

When you update this value, the same value is updated to the **Line Discount%** field in the applied purchase discount line.



3. The **Applied Discount Unit of Measure Code** field automatically inherits the value from the **Unit of Measure Code** field in the applied purchase discount line.

This value is not editable on the purchase lines.

The values entered on the purchase order lines for the above fields are updated automatically on the **Applied Purchase Price and Discount** page and vice versa.

This applies to both purchase quotes and purchase blanket orders.



Set up purchase price reference date

Article • 11/26/2025 • 3 min read

On the **Vendor Card** page, on the **Invoicing** FastTab, in the **Advanced Pricing** section, in the **Purchase Price Reference Date** field, select the date type the system uses when determining purchase prices. The available options are:

- Order Date
- Expected Receipt Date
- Requested Receipt Date
- Promised Receipt Date

Note

If the **Purchase Price Reference Date** field value is left blank, the system defaults to using the order date for price determination.

On the **Vendor Card** page, on the **Invoicing** FastTab, in the **Advanced Pricing** section, in the **Purchase Price Reference Vendor** field, select another vendor whose price lists the system uses for price determination.

Note

- When you create a purchase document for the selected vendor, the system retrieves prices from the price list lines of the referenced vendor instead of the actual vendor.
- If the **Purchase Price Reference Vendor** field value is left blank, the system uses the actual vendor number for price determination.

When you create a purchase order for a vendor with the **Pricing Method** field set to *Advanced Pricing*, the system automatically applies prices based on the vendor configuration.

On the **Purchase Order** page, on the **General** FastTab, the **Purchase Price Reference Vendor** field displays the reference vendor number configured on the vendor card. This field is not editable.

When you add lines to the purchase order, the system determines prices as follows:

1. The system checks the **Purchase Price Reference Date** field value on the vendor card to identify which date to use for price lookups.
2. The system retrieves prices from the price lists of the vendor specified in the **Purchase Price Reference Vendor** field.
3. The system validates minimum quantity requirements and applies the correct price based on the reference date.



For example a purchase order with the following configuration:

- The **Order Date** field value is set to *02-10-2025*
- The **Expected Receipt Date** field value is set to *12-10-2025*
- The **Purchase Price Reference Vendor** field value is set to *10001*

The system applies prices from vendor 10001's price lists valid on 12-10-2025.

Item No.	Description	Quantity	Unit of Measure	Applied Price	Source
0025	Tomatoes Box 10 kg	100	BOX	14.50 per BOX	Vendor 10001
0030	Cheddar Cheese 5 kg	50	PCS	18.75 per PCS	Vendor 10001
0040	Butter 25 kg block	60	BLOCK	96.00 per BLOCK	Vendor 10001

When you change the **Expected Receipt Date** field value to *20-10-2025*, the system displays a confirmation message.

If you select **Yes**, the system re-evaluates each line based on the new reference date:

 **Note**

- The confirmation message appears when you change the **Expected Receipt Date**, **Requested Receipt Date**, or **Promised Receipt Date** field values.
- If the **Purchase Price Reference Vendor** field value is left blank, the system uses the actual vendor for price determination.
- If the **Purchase Price Reference Date** field value is left blank, the system defaults to the order date.
- If the reference vendor has no valid price list line for the reference date, the system uses the actual vendor price list.
- This functionality applies only when the **Pricing Method** field value is set to *Advanced Pricing* on the vendor card.



Advanced pricing method hierarchy

Article • 5/29/2023 • 12 min read

When creating a new sales document, the system will determine the price calculation method. In this topic, we presume that the price calculation method is set to the advanced pricing method.

To explain how a price is selected in a sales order line, we will give an example. Let's say you have created a sales order for customer C0015, with an order line for item number 15:

SALES ORDER					CUSTOMER CARD C0015		
Customer:	C0015				Sales Price Reference Customer:	-	
Order date:	15/08/2019				Sales Price Reference date:	Shipment date	
Shipment date:	15/12/2019				Customer Group:	RETAIL	
Campaign:	ISMCOLOGNE						
Currency:	USD						
Item No.	Variant Code	UoM	Quantity	Unit Price			
15	RED	Box	80	?			

And let's assume you have specified the following price lines for item 15 on the **Sales Prices** page. Lines that do not match the selected item number, customer, customer group or campaign are already filtered out in this picture.

Price List									
Item No.	Source Type	Source No.	Starting Date	Currency Code	Variant Code	Unit of Measure	Min. Qty.	Unit Price	Ending Date
15	ALL CUSTOMER		01/01/2019	USD	RED	BOX	0	17,5	
15	ALL CUSTOMER		01/01/2020		YELLOW	BOX	0	4,99	
15	ALL CUSTOMER		01/01/2020	GBP		BOX	0	5,01	
15	ALL CUSTOMER		01/01/2020	GBP	YELLOW	BOX	0	4,98	
15	CUST PRICE GROUP	RETAIL	01/01/2020	USD	RED	BOX	0	15	
15	CUSTOMER	C0015	01/01/2017	USD	RED	BOX	50	8,75	
15	CUSTOMER	C0015	01/01/2018				0	11,25	
15	CUSTOMER	C0015	01/01/2018			BOX	0	12	
15	CUSTOMER	C0015	01/01/2018			PALLET	1	485	
15	CUSTOMER	C0015	01/01/2018		RED	BOX	0	11,5	
15	CUSTOMER	C0015	01/01/2018	USD		BOX	0	11	
15	CUSTOMER	C0015	01/01/2018	USD	BLUE	BOX	0	10	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	0	10	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	10	9	
15	CUSTOMER	C0015	01/01/2018	USD	RED		10	9,2	
15	CUSTOMER	C0015	01/01/2019	USD	RED	BOX	100	8	
15	CUSTOMER	C0015	01/01/2019	USD	RED	PALLET	1	500	01/12/2019
15	CUSTOMER	C0015	01/01/2019	XEN	RED	BOX	90	7	
15	CUSTOMER	C0015	01/01/2020			BOX	0	14,01	
15	CUSTOMER	C0015	01/01/2020		BLUE	BOX	0	14	
15	CUSTOMER	C0015	01/01/2020		RED	BOX	0	12,22	
15	CUSTOMER	C0015	01/01/2020	USD	BLUE	BOX	0	13	
15	CAMPAIGN	ISMCOLOGNE	15/01/2020			BOX	0	10,39	

So which price from the price list will be chosen for the order line? First, the system will filter out all price lines that are not valid for this order. The picture below explains when a price line is valid or invalid.

		Which lines are valid?
Item number		Only price lines with <i>same</i> item number as the item on the order line are valid.
Sales type/Sales code		<ul style="list-style-type: none"> Lines with Sales Type CUSTOMER are only valid when the customer is equal to the customer on the order or to the sales price reference customer (when this field is specified for the customer on the order).



	<ul style="list-style-type: none"> Lines with Sales Type CUSTOMER PRICE GROUP are only valid when the customer group is linked to the customer on the order. Lines with Sales Type CAMPAIGN are only valid when this campaign is selected on the order. Lines with Sales Type ALL CUSTOMER are always valid.
Starting date	<ul style="list-style-type: none"> For <i>sales orders</i>: only price lines with <i>no</i> starting date or a starting date that is <i>before or equal to</i> order/shipment/promised delivery/requested delivery date are valid: Which of these dates is applicable depends on the 'Sales Price Reference Date', specified on the customer card. For other <i>sales documents</i>: only price lines with <i>no</i> starting date or a starting date that is <i>before or equal to</i> the order date are valid.
Currency code	Only price lines that have <i>no</i> currency code (i.e., representing the default system currency) or have the <i>same*</i> currency code as the currency on the order header are valid.
Variant code	Only price lines that have <i>no</i> variant code or have the <i>same</i> variant code as the item on the order line are valid.
Unit of measure	All unit of measure codes are valid.
Minimum quantity	Only lines that have a <i>lower</i> minimum quantity than the quantity in the order line are valid.
Ending date	<ul style="list-style-type: none"> For <i>sales orders</i>: only price lines that have <i>no</i> starting date, or a starting date that is <i>before or equal to</i> the order date are valid. Which of these dates is applicable depends on the 'Sales Price Reference Date', specified on the customer card. For other <i>sales documents</i>: only price lines with <i>no</i> starting date or a starting date that is <i>before or equal to</i> the order date are valid.

 **Note**

When a different unit of measure code is specified in the price line than in the order line, the minimum quantity is recalculated using the item unit of measure table.



! Note

When determining the sales discount instead of the sales price, a similar process is followed. But additionally, the item discount group is then also considered. If no item number is found at a certain level but a discount is present for an item discount group that is assigned to the item, then this discount will be considered. And instead of the sales type *customer price group*, the system will search for the sales type *customer discount group*.

Using the rules in the picture above, the pink lines in the picture below are filtered out of the price list in our example. The reason why they are not valid (in combination with our order example) is highlighted in red.

! Note

When no lines remain, the *Unit Price* of the item card would be used on the order line.

Price List

Item No.	Source Type	Source No.	Starting Date	Currency Code	Variant Code	Unit of Measure	Min. Qty.	Unit Price	Ending Date
15	ALL CUSTOMER		01/01/2019	USD	RED	BOX	0	17,5	
15	ALL CUSTOMER		01/01/2020		YELLOW	BOX	0	4,99	
15	ALL CUSTOMER		01/01/2020	GBP		BOX	0	5,01	
15	ALL CUSTOMER		01/01/2020	GBP	YELLOW	BOX	0	4,98	
15	CUST PRICE GROUP	RETAIL	01/01/2020	USD	RED	BOX	0	15	
15	CUSTOMER	C0015	01/01/2017	USD	RED	BOX	50	8,75	
15	CUSTOMER	C0015	01/01/2018				0	11,25	
15	CUSTOMER	C0015	01/01/2018			BOX	0	12	
15	CUSTOMER	C0015	01/01/2018			PALLET	1	485	
15	CUSTOMER	C0015	01/01/2018		RED	BOX	0	11,5	
15	CUSTOMER	C0015	01/01/2018	USD		BOX	0	11	
15	CUSTOMER	C0015	01/01/2018	USD	BLUE	BOX	0	10	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	0	10	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	10	9	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	10	9,2	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	100	8	
15	CUSTOMER	C0015	01/01/2019	USD	RED	PALLET	1	500	01/12/2019
15	CUSTOMER	C0015	01/01/2019	XEN	RED	BOX	90	7	
15	CUSTOMER	C0015	01/01/2020			BOX	0	14,01	
15	CUSTOMER	C0015	01/01/2020		BLUE	BOX	0	14	
15	CUSTOMER	C0015	01/01/2020		RED	BOX	0	12,22	
15	CUSTOMER	C0015	01/01/2020	USD	BLUE	BOX	0	13	
15	CAMPAIGN	ISMCOLOGNE	15/01/2020			BOX	0	10,39	

After filtering out these *invalid* price lines, the system will continue to filter lines (in 4 steps) based on a certain hierarchy (which also applies when a discount is retrieved). The most important fields are **Currency Code** and **Variant Code**. The first step the system will take is checking whether price lines exist in which the values of both fields match the values in the order (line). If so, it will continue to step 2 with those price lines. If they are not found, it will look further for lines that contain only the correct currency code. If those are not found, it will look for lines that contain only the correct variant code. And finally, if those are not found, it will continue to step 2 with the remaining price lines (which have no value for both fields).

In the second step, the remaining lines are filtered on the Source Type field. Lines with sales type *Campaign* trump lines with *CUSTOMER*, which in turn trump lines with *CUSTOMER PRICE GROUP*, which in turn trump lines of type *ALL CUSTOMERS*.

Next (if multiple lines still exist), price lines with the most recent starting date will be selected. And of those lines, the price line(s) with the highest minimum quantity remain(s).



Hierarchical selection of price lines

Most important		Least important		
Step 1: Currency Code + Variant Code		Price lines in which currency code and variant code are the same as in the order line.	Price lines in which variant code is empty and currency code is the same as in the order line.	Price lines in which currency code is empty and variant code is the same as in the order line.
Step 2: Sales Type	CAMPAIGN	CUSTOMER	CUSTOMER PRICE GROUP	ALL CUSTOMERS
Step 3: Unit of Measure				Price lines in which the UoM is empty or differs from the UoM in the order line.
Step 4: Starting date	The most recent (e.g. today)			The oldest (e.g. last year)
Step 5: Minimum Quantity	The highest min. quantity			The lowest min. quantity

Applying these four steps to the valid price lines we had left in our example, would filter out the orange lines in the picture below, resulting in 1 remaining (grey) price line. Explanation:

Step 1: Since price lines with *USD* and *RED* exist, 5 lines are filtered out.

Step 2: *CUSTOMER* trumps *ALL CUSTOMER*, so the line with *ALL CUSTOMER* is filtered out.

Step 3: As price lines with UoM *BOX* exist, the price line with no UoM is filtered out.

Step 4: As *2017* is older than *2018*, the line with starting date *01/01/2017* is filtered out.

Step 5: As *10* is higher than *0*, the line that remains is the line with minimum quantity *10*.

The unit price that will be used in the order will be *9 USD*.

Price List								
Item No.	Source Type	Source No.	Starting Date	Currency Code	Variant Code	Unit of Measure	Min. Qty.	Unit Price Ending Date
15	ALL CUSTOMER		01/01/2019	USD	RED	BOX	0	17,5
15	ALL CUSTOMER		01/01/2020		YELLOW	BOX	0	4,99
15	ALL CUSTOMER		01/01/2020	GBP		BOX	0	5,01
15	ALL CUSTOMER		01/01/2020	GBP	YELLOW	BOX	0	4,98
15	CUST PRICE GROUP RETAIL		01/01/2020	USD	RED	BOX	0	15
15	CUSTOMER	C0015	01/01/2017	USD	RED	BOX	50	8,75
15	CUSTOMER	C0015	01/01/2018				0	11,25
15	CUSTOMER	C0015	01/01/2018			BOX	0	12
15	CUSTOMER	C0015	01/01/2018			PALLET	1	485
15	CUSTOMER	C0015	01/01/2018		RED	BOX	0	11,5
15	CUSTOMER	C0015	01/01/2018	USD		BOX	0	11
15	CUSTOMER	C0015	01/01/2018	USD	BLUE	BOX	0	10
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	0	10
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	10	9
15	CUSTOMER	C0015	01/01/2018	USD	RED		10	9,2
15	CUSTOMER	C0015	01/01/2019	USD	RED	BOX	100	8
15	CUSTOMER	C0015	01/01/2019	USD	RED	PALLET	1	500 01/12/2019
15	CUSTOMER	C0015	01/01/2019	XEN	RED	BOX	90	7
15	CUSTOMER	C0015	01/01/2020			BOX	0	14,01
15	CUSTOMER	C0015	01/01/2020		BLUE	BOX	0	14
15	CUSTOMER	C0015	01/01/2020		RED	BOX	0	12,22
15	CUSTOMER	C0015	01/01/2020	USD	BLUE	BOX	0	13
15	CAMPAIGN	ISMCOLOGNE	15/01/2020			BOX	0	10,39

In the example above, the price line that is selected in the end contains the currency *USD*. Since the order contains the same currency, the price does not need to be recalculated. However, if the selected price line contains an empty currency code (representing the local currency as set up in the General Ledger Setup), the price would be recalculated to *USD* before entering it in the order line. See [Sales prices and discounts in sales documents](#) for more details.

In the example above, the price line that is selected in the end contains the unit of measure *BOX*. Since the item on the order line is also specified in *BOX*, the price does not need to be recalculated. However, this is not always the case. Below, four possible situations that could result after step 5 are described.



Situation after step 5	Result
1 One price line results, which contains the same unit of measure as the item in the order line.	The price of the price line is used without recalculation.
2 One price line results, which contains no unit of measure code.	The base unit of measure of the item will be used. The price from the price line is recalculated from the base unit of measure to the unit of measure on the order line, using the Item Unit of Measure table.
3 One price line results, which contains another unit of measure than the the item in the order line.	The price from the price line is recalculated from the unit of measure on the price line to the unit of measure on the order line, using the Item Unit of Measure table.
4 Multiple price lines result. All of them contain no, or another unit of measure than in the order line.	The system cannot chose which price line to use, so no price will be selected . You will have to select which pric to use manually, using the function 'Get Price' on the order line.



Advanced pricing method hierarchy with lot attribute values

Article • 5/29/2023 • 13 min read

To execute the price calculation based on the attribute driven pricing on the sales/purchase documents, the price list pages should be created with values predefined for an item. When the **Attribute Driven Pricing** toggle is turned on and the Price Calculation method is set to **Advanced Pricing Method**, the selection of the price on the lines takes place as follows:

To explain how a price is selected in a sales order line, we will give an example. Let's say you have created a sales order for customer C0015, with an order line for item number 15 along with the below attributes and location code:

SALES ORDER							CUSTOMER CARD C0015						
Customer:	C0015						Sales Price Reference Customer:	-					
Order Date:	15/08/2019						Sales Price Reference date:	Shipment date					
Shipment Date:	15/12/2019						Customer Group:	RETAIL					
Campaign:	ISMCOLOGNE						Currency:	USD					
Item No.	Variant Code	Quantity	Grade(Fixed)	Ripeness	Size	Class	Product Group	PackType	CoO	Bio	UOM	Location	Unit Cost/Price
15	RED	80	A	Unripe	Large	1		BOX		EAST			?

Let us assume that you have specified the following price lines for item 15 on the Sales Price page. Lines that do not match the selected item number, Customer, Customer group or Campaign are already filtered out in this picture.

Item No.	Source Type	Source No.	Starting Date	Current Date	Variant	UoM	Min Quantity	Grade (Fixed)	Ripeness	Size	Class	Product Group	PackType	CoO	Bio	Location	Unit Price	Ending date
15	ALL CUSTOMER	018102019	018102020	USD	RED	BOX	0	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	YES	EAST	4.99	
15	ALL CUSTOMER	018102020		YELLOW	BOX	0	A	UNRIPE	MEDIUM	1	VEGETABLES	LOOSE	INDIA	NO	EAST			
15	ALL CUSTOMER	018102020	018102020	GBP	BOX	0	A	UNRIPE	MEDIUM	2	VEGETABLES	LOOSE	INDIA	NO	NORTH	5.01		
15	CUSTOMER	018102020	018102020	GBP	YELLOW	BOX	0	A	UNRIPE	MEDIUM	2	VEGETABLES	LOOSE	INDIA	NO	EAST	4.99	
15	CUST PRICE GROUP	RETAIL	018102020	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	YES	EAST	15	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	8.75	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	11.25	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	MEDIUM	1	VEGETABLES	LOOSE	INDIA	NO	NORTH	12	
15	CUSTOMER	018102019	018102019	USD	RED	PALLET	0	A	UNRIPE	MEDIUM	2	VEGETABLES	LOOSE	INDIA	NO	NORTH	485	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	0	A								EAST	11.5	
15	CUSTOMER	018102019	018102019	USD	BOX	0	A									WEST	11	
15	CUSTOMER	018102019	018102019	USD	BLUE	BOX	0	A								NORTH	10	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	0	A								SOUTH	10	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	10	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	YES	EAST	9	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	10	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	9.2	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	100	A	UNRIPE	MEDIUM	1	VEGETABLES	LOOSE	INDIA	NO	NORTH	8	
15	CUSTOMER	018102019	018102019	USD	RED	PALLET	1	A								VEGETABLES	INDIA	999 09/12/2019
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A								MEDIUM	LOOSE	NORTH
15	CUSTOMER	018102020	018102020	USD	BOX	0	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	WEST	14.81		
15	CUSTOMER	018102020	018102020	USD	BLUE	BOX	0	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102020	018102020	USD	RED	BOX	0	A								INDIA	NORTH	12.22
15	CUSTOMER	018102020	018102020	USD	BLUE	BOX	0	A	UNRIPE							EAST	13	
15	CUSTOMER	018102020	018102020	USD	RED	BOX	0	A								VEGETABLES	WEST	13.39
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	YES	EAST	11	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	018102019	018102019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15</td																		

	<p>specified for the customer on the order).</p> <ul style="list-style-type: none"> • Lines with Sales Type CUSTOMER PRICE GROUP are only valid when the customer group is linked to the customer on the order. • Lines with Sales Type CAMPAIGN are only valid when this campaign is selected on the order. • Lines with Sales Type ALL CUSTOMER are always valid.
Starting date	<ul style="list-style-type: none"> • For <i>sales orders</i>: only price lines with no starting date or a starting date that is before or equal to order/shipment/promised delivery/requested delivery date are valid: Which of these dates is applicable depends on the 'Sales Price Reference Date', specified on the customer card. • For other <i>sales documents</i>: only price lines with no starting date or a starting date that is before or equal to the order date are valid.
Currency code	Only price lines that have no currency code (i.e., representing the default system currency) or have the same currency code as the currency on the order header are valid.
Variant code	Only price lines that have no variant code or have the same variant code as the item on the order line are valid.
Unit of measure	All unit of measure codes are valid.
Minimum quantity	<p>Only lines that have a lower minimum quantity than the quantity in the order line are valid.</p> <div style="border: 1px solid #0078D4; padding: 10px; margin-top: 10px;"> <p>When in the price line another unit of measure code is specified than in the order line, the minimum quantity is recalculated using the item unit of measure table.</p> </div>
Ending date	<ul style="list-style-type: none"> • For <i>sales orders</i>: only price lines that have no ending date, or an ending date that is after the order/shipment/promised delivery/requested delivery date are valid. Which of these dates is applicable depends on the 'Sales Price Reference Date', specified on the customer card. • For other <i>sales documents</i>: only price lines with no starting date or a starting date that is before or equal to the order date are valid.
Location	Only Lines with the same location on the order line are valid.



Global Lot Attributes	Only lines that have no global lot attribute values or have the same global lot attributes on the order line are valid.
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! Note

When determining the sales discount instead of the sales price, a similar process is followed. But additionally, the item discount group is then also considered. If no item number is found at a certain level but a discount is present for an item discount group that is assigned to the item, then this discount will be considered. And instead of the sales type *customer price group*, the system will search for the sales type *customer discount group*.

Using the rules in the picture above, the pink lines in the picture below are filtered out of the price list in our example. The reason why they are not valid (in combination with our order example) is highlighted in red.

! Note

When no lines remain, the *Unit Price* of the item card would be used on the order line.

After filtering out these *invalid* price lines, the system will continue to filter lines (in 7 steps) based on a certain hierarchy (which also applies when a discount is retrieved). The most important fields are **Currency Code** and **Variant Code**. The first step the system will take is checking whether price lines exist in which the values of both fields match the values in the order (line). If so, it will continue to step 2 with those price lines. If they are not found, it will look further for lines that contain only the correct currency code. If those are not found, it will look for lines that contain only the correct variant code. And finally, if those are not found, it will continue to step 2 with the remaining price lines (which have no value for both fields).

In the second step, the remaining lines are filtered on the *Source Type* field. Lines with sales type *Campaign* trump lines with *CUSTOMER*, which in turn trump lines with *CUSTOMER PRICE GROUP*, which in turn trump lines of type *ALL CUSTOMERS*.

In the third step, the Unit of Measure Code is checked for the exact match between the price list lines and order line.



Next (if multiple lines still exist), price lines with the most recent starting date will be selected. And of those lines, the price line(s) with the highest minimum quantity remain(s).

Then, the system checks for the lines that have the same location code as that of the order line. Finally, the system will look for any pricing lines that already exist with the same global attribute values as the order line. If they cannot be located, it will look for lines in the global lot attribute fields that have least matching or empty values.

Note

The system accepts any values on the pricing list lines for the blank field values on the order line.

Hierarchical selection of price lines				
	Most Important → Least Important			
Step 1 Currency Code + Variant Code	Price lines in which currency code and variant code are the same as in the order line.	Price lines in which the variant code is empty, and the currency code is the same as in the order line.	Price lines in which the currency code is empty, and the variant code is the same as in the order line.	Price lines in which currency code and variant code are both empty.
Step 2 Sales Type	CAMPAGN	CUSTOMER	CUSTOMER PRICE GROUP	ALL CUSTOMERS
Step 3 Unit of Measure	Price lines in which the UoM is the same as the UoM in the order line.			Price lines in which the UoM is empty, or differs from the UoM in the order line.
Step 4 Starting date	The most recent (e.g., today)			The oldest (e.g., last year)
Step 5 Minimum Quantity	The highest min. quantity			The lowest min. quantity
Step 6 Location	Price lines in which the location is the same as the location in the order line.			
Step 7 Global Lot Attribute	Price lines in which the global lot attributes are the same or empty as in the order line.			

Applying these seven steps to the valid price lines we had left in our example, would filter out the orange lines in the picture below, resulting in remaining (grey) price lines. Explanation:

Step 1: Since price lines with *USD* and *RED* exist, two lines are filtered out.

Step 2: *CUSTOMER* trumps *ALL CUSTOMER*, so the line with *ALL CUSTOMER* is filtered out.

Step 3: As price lines with UoM *BOX* exist, the price line with no UoM is filtered out.

Step 4: As *2017* and *_2018_* are older than, the line with starting date *01/01/2017* & *01/01/2018* are filtered out.

Step 5: As the remaining lines are with same minimum quantity *50*, all three lines exist.

Step 6: As price lines with Location *East* exist, the price line with other or no locations are filtered out.

Step 7: Finally, the system will filter and only display the pricing lines that match the order line's global lot attribute values. However, if any value is not specified or left blank in the order line, the system will also consider any assigned or empty values in the pricing line for that specific global lot attribute.



Advanced Pricing

Item No.	Source Type	Source No.	Starting Date	Currency code	Variant code	UoM	Min. Quantity	Grade (Fixed)	Ripeness	Size	Class	Product Group	PackType	CoD	Bio	Location	Unit Price	Ending date
11	ALL CUSTOMER	C0015	01/01/2019	USD	RED	BOX	0	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	YES	EAST	17.5	
12	ALL CUSTOMER	C0015	01/01/2019	USD	YELLOW	BOX	0	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	6.91	
13	ALL CUSTOMER	C0015	01/01/2020	GBP	YELLOW	BOX	0	A	UNRIPE	EDIUM	1	VEGETABLES	LOOSE	INDIA	NO	NORTH	5.01	
14	CUST PRICE GROUP	RETAIL	01/01/2020	USD	RED	BOX	0	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	NORTH	4.98	
15	CUSTOMER	C0015	01/01/2017	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	YES	EAST	8.75	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	0	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	11.25	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	0	A	UNRIPE	EDIUM	1	VEGETABLES	LOOSE	INDIA	NO	NORTH	12	
15	CUSTOMER	C0015	01/01/2018	USD	PALLET	0	A	UNRIPE	EDIUM	2	VEGETABLES	LOOSE	INDIA	NO	NORTH	485		
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	0	A								EAST	15	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	0	A								WEST	11	
15	CUSTOMER	C0015	01/01/2018	USD	BLUE	BOX	0	A								NORTH	10	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	0	A								SOUTH	10	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	10	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	YES	EAST	9	
15	CUSTOMER	C0015	01/01/2018	USD	RED	BOX	10	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	9.2	
15	CUSTOMER	C0015	01/01/2019	USD	RED	BOX	100	A	UNRIPE	EDIUM	1	VEGETABLES	LOOSE	INDIA	NO	NORTH	8	
15	CUSTOMER	C0015	01/01/2019	USD	RED	PALLET	1	A				VEGETABLES	LOOSE	INDIA	NO	EAST	500	01/13/2019
15	CUSTOMER	C0015	01/01/2019	USD	RED	BOX	90	A								NORTH	7	
15	CUSTOMER	C0015	01/01/2020	USD	RED	BOX	0	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	WEST	14.51	
15	CUSTOMER	C0015	01/01/2020	USD	BLUE	BOX	0	A	UNRIPE							EAST	14	
15	CUSTOMER	C0015	01/01/2020	USD	RED	BOX	0	A								WEST	10.39	
15	CAMPAGN	ISACOLOGNE	01/01/2020	USD	RED	BOX	0	A				VEGETABLES	LOOSE	INDIA	YES	EAST	11	
15	CUSTOMER	C0015	01/01/2019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	YES	EAST	14	
15	CUSTOMER	C0015	01/01/2019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	
15	CUSTOMER	C0015	01/01/2019	USD	RED	BOX	50	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	

Based on the above the following lines are filtered,

Item No.	Source Type	Source No.	Starting Date	Currency code	Variant code	UoM	Min. Quantity	Grade (Fixed)	Ripeness	Size	Class	Product Group	PackType	CoD	Bio	Location	Unit Price	Ending date
15	CUSTOMER	C0015	01/01/2019	USD	RED	BOX	0	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	YES	EAST	11	
15	CUSTOMER	C0015	01/01/2019	USD	RED	BOX	90	A	UNRIPE	LARGE	1	VEGETABLES	LOOSE	INDIA	NO	EAST	14	

When multiple records are found after the hierarchical filtering, the system will select the price from the line with lowest price. Here it will select the Unit Price of 11 from the filtered lines as it is the lowest.



Information about the applied sales price and discount

Article • 12/11/2024 • 21 min read

When creating a sales price line for a customer that is set up with the *Advanced Pricing* method, the system will apply a price and discount according to the hierarchy mentioned in the previous topic. In the sales price line, the additional **Applied Sales Price and Discount** page is added to give the user more information about the applied price and discount in the sales price line.

In this example, a sales order line is created for item number "0015", the base unit of measure is a can, and the customer is set up with the *Advanced Pricing* method. The system automatically calculates the unit price and line discount based on the *Advanced Pricing* method. The **Applied Sales Price and Discount** page shows all relevant information about the selected sales price line and sales discount line on which these values are based. The conversion from the unit price on the price line to the unit price on the sales price line is explained by considering the different unit of measures, different currencies and the including/excluding VAT difference.

The **Applied Sales Price and Discount** page can be opened from the following sales documents:

- Sales order
- Sales return order
- Sales invoice
- Sales credit memo
- Sales quote
- Blanket sales order
- For example, on a sales order, on the action bar, select **Line > Related Information > Applied Sales Price and Discount**.

The page **Applied Sales Price and Discount** can also be opened by clicking directly on the row button on the sales order line on the **Lines** FastTab.



1. In the **Type** field, select the context menu , and then select **Applied Sales Price and Discount**.

The **Applied Sales Price & Discount** page has four FastTabs, as explained below:

The **Applied Sales Price Line** FastTab displays the price line that is applied.

Field	Description
Originated From	Specifies where the price line originates from. It could be a price line that was set up in the Sales Prices list, it could be the price from the item card (when no valid sales price line exists),



	or it could be a price that was manually specified.
Frozen	Specifies if the applied sales price line is frozen. When frozen, it will not change anymore when you adjust for example the order quantity or UoM in the sales line.
Price List Code	Specifies the price list to which this sales price line belongs.
Source Type	Specifies to what type of source this price line applies. It is assigned based on the option selected in the Assign-to Type on the Sales Price List page.
Source No.	Specifies the number or the code of the source to which this price line applies.
Asset No.	Specifies the number of the item to which this price line applies.
Variant Code	Specifies the item variant to which this price line applies.
Unit of Measure Code	Specifies the unit of measure of the item.
Minimum Quantity	Specifies the minimum quantity required in a sales line for this price line to be valid. The minimum quantity is expressed in the unit of measure of this line.
Unit Price	Specifies the sales price of the item/variant expressed per unit of measure of this line.
Currency Code	Specifies the currency in which the unit price is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup. The Applied Currency Code field on the sales order, blanket sales order, sales invoice, and sales credit memo will inherit this values based on the selection of customer and item.
Allow Line Disc.	Specifies if a possible available line discount may be subtracted from the unit price of this price line.
Allow Invoice Disc.	Specifies if a possible available invoice discount may be subtracted from the unit price of this price line.
Price Includes VAT	Specifies if the unit price includes VAT.
Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.



The **Applied Sales Discount Line** FastTab displays the origin of the discount that is applied.

Field

Description



Originated From	Specifies where the price line originates from. It could be a price line that was set up in the Sales Prices list, it could be the price from the item card (when no valid sales price line exists), or it could be a price that was manually specified.
Minimum Quantity	Specifies the minimum quantity required in a sales line for this discount line to be valid. The minimum quantity is expressed in the unit of measure of this line.
Discount Method	Specifies whether the discount value is specified as a percentage or as an absolute amount.
Discount Value	Specifies the discount that will be granted to the sales line, expressed as a percentage or absolute amount (see Discount Method field).
Currency Code	Specifies the currency in which the discount is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.
Price Includes VAT	Specifies if the discount value (absolute amount) includes VAT.
Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.

The screenshot shows the 'Applied Sales Discount Line' FastTab with the following data:

Field	Value
Originated From	Customer
Price List Code	PL-0046
Source Type	Customer
Source No.	C0015
Asset Type	Item
Asset No.	0011
Variant Code	
Unit of Measure Code	KG
Minimum Quantity	0
Discount Method	Amount
Discount Value	0.06
Price Incl. VAT	
Starting Date	1/1/2021
Ending Date	12/31/2021

The **Applied Item Unit of Measure** FastTab displays the unit of measure codes that are used in the applied sales price line, the applied sales discount line, or in the sales document line.

Field	Description
Code	Specifies the unit of measure code that is used in the applied document price line, the applied document discount line or the document line.
Quantity Expressed in the UoM	Specifies how many units (expressed in the unit of measure code) are linked to the number of units as specified in the field 'Quantity Expressed in the Base Unit of Measure'.
Quantity Expressed in BOX	Specifies how many units (expressed in the base unit of measure) are linked to the number of units as specified in the field 'Quantity Expressed in the UoM' (expressed in the unit of measure code).

The screenshot shows the 'Applied Item Unit of Measure' FastTab with the following data:

Field	Value
Code	KG
Quantity Expressed in the UoM	10
Quantity Expressed in BOX	1



- The **Price calculation** FastTab displays fields related to applied price (**Price** group) and applied discount (**Discount** group).

Field	Description
Unit Price from Sales Price Line	Specifies the unit price per unit of measure (incl. or excl. VAT), as set up in the applied sales price line.
Unit of Measure Recalculation Factor	Specifies the ratio between the unit of measure from the applied sales price line and the unit of measure from the sales document line. This ratio is used to recalculate the unit price from the price line to the unit price on the document line, in case they are specified for different units of measure.
Currency Recalculation Factor	Specifies the ratio between the currency from the applied sales price line and the currency from the sales document. This ratio is used to recalculate the unit price from the price line to the unit price on the document line, in case they are specified in different currencies.
VAT Recalculation Factor	Specifies the VAT percentage as set up on the VAT Posting Setup page. This percentage is used to recalculate the unit price from the applied sales price line to the unit price on the sales document line, in case one of them is specified as 'incl. VAT' and the other as 'excl. VAT'.
Unit Price (Converted)	Calculates the adjusted unit price by applying recalculation factors such as unit of measure (UoM) and currency conversions to the initial unit price from the applied sales price line. This calculation involves multiplying the initial unit price on the sales price line by the item's net weight, resulting in the final converted unit price that reflects accurate pricing based on these adjustments.
Discount Method	Specifies whether the discount value from the applied sales discount line is specified as a percentage or as an absolute amount.
Discount Value from Sales Discount Line	Specifies the discount value per unit of measure, as set up in the applied sales discount line.
Unit of Measure Recalculation Factor	Specifies the ratio between the unit of measure from the applied sales discount line and the unit of measure from the sales document line. This ratio is used to recalculate the discount from



	the discount line to the discount percentage on the document line, in case they are specified for different units of measure.
Currency Recalculation Factor	Specifies the ratio between the currency from the applied sales discount line and the currency from the sales document. This ratio is used to recalculate the discount from the discount line to the discount percentage on the document line, in case they are specified in different currencies.
VAT Recalculation Factor	Specifies the VAT percentage and VAT calculation as set up on the VAT Posting Setup page. This percentage, if applicable based on the VAT calculation type, is used to recalculate the discount from the discount line to the discount on the sales document line, in case one of them is specified as 'incl. VAT' and the other as 'excl. VAT'.
Discount Value (Converted)	Indicates the discount value derived from the applied sales discount line. This value is calculated by multiplying the item's net weight by the standard discount for regular items.
Base Line Discount %	Specifies the line discount percentage based on the unit price (converted) and discount amount (converted) of the document line. If the Discount Method field is set to <i>Percentage</i> for the applied line discount, this field displays the discount percentage from the discount line.

You can view how the unit price from the sales price line (**Unit Price from Sales Price Line** field) is converted into the unit price on the sales price line (**Unit Price in Sales Price Line** field), taking into consideration the unit of measure code and/or the currency code from the applied sales price line can differ from the codes on the sales price line. The same calculation applies if the unit price in the sales price line is expressed including VAT, while the unit price on the sales price line is expressed excluding VAT (or vice versa).

Price calculation	
Price	
Unit Price from Sales Price Line	1,000.00 GBP/PALLET excl. VAT
Unit of Measure Recalculation Factor	PALLET/PCS = 1.00
Currency Recalculation Factor	GBPEUR = 64.58 100
VAT Recalculation Factor	
Unit Price in Sales Line	4,6454 EUR/PCS excl. VAT
Unit Price Excl. VAT	4,6454
Discount	
Discount Method	
Discount Value from Sales Discount Line	0.06 GBP/KG excl. VAT
Unit of Measure Recalculation Factor	KG/PCS = 101
Currency Recalculation Factor	GBPEUR = 64.58 100
VAT Recalculation Factor	
Discount Value	0.93 EUR/PCS excl. VAT
Line Discount % in Sales Line	20%
Base Line Discount	

The following fields on the **Price Calculation** FastTab are displayed only when the Aptean [Catch Weight](#) extension is installed.

Field	Description
Weight Recalculation Factor	Defines the ratio between the actual weight of a catch weight item, as recorded on the item tracking lines, and the item's standard net weight. The ratio is determined by dividing the updated weight quantity to invoice specified on the item tracking lines by the standard weight quantity. This recalculated unit price accounts for variations between the item's net weight and actual recorded weight. If the sales order is partially posted, the Weight Recalculation Factor and Unit Price (Converted) by Weight Factor fields will update



	automatically based on the invoiced weight quantities. Note that the Weight Recalculation Factor field will only display a value if the Update Catch Weight Item Unit Price action is executed or when a document is posted for shipment or invoice. If not, this field will remain empty.
Unit Price (Converted) by Weight Factor	Determines the unit price adjusted by the weight recalculation factor to reflect the actual price of a catch weight item on the sales line unit of measure. The final unit price is obtained by multiplying the weight recalculation factor and the unit price (converted).
Discount Value (Converted) by Weight Factor	Indicates the discount value adjusted by the weight recalculation factor to determine the actual discount for the catch weight item based on the weight quantity to invoice and the weight quantity already invoiced as specified in the item tracking lines when the Discount Method field is set to <i>Amount</i> . This value is calculated by multiplying the weight recalculation factor by the discount value (converted). If the Discount Method is set to <i>Percentage</i> for the applied line discount, no value will be displayed in this field.

You can also view these fields on the following pages:

- Blanket Sales Order
- Sales Quote
- Sales Order
- Sales Order Achieve
- Sales Invoice
- Posted Sales Invoice
- Sales Return Order
- Sales Credit Memo
- Posted Sales Credit Memo

The **Applied Trade Lines** FastTab displays fields related to applied price (**Price** group) and applied discount (**Discount** group).

Field	Description
Trade Base Unit Price (per Sales Price UoM)	Specifies the base unit price per sales price unit of measure that is used as the starting point to which trade plan rates are applied. Depending on the set up of the first trade plan line in the trade calculation, this will be either the unit cost of the



	item or the price that was found in the Sales Price list recalculated to the currency of the sales document.
Total Price Increase (per Sales Price UoM)	Specifies the sum of all price increases per sales price unit of measure that result from the applied document trade lines.
New Unit Price (per Sales Price UoM)	Specifies the new unit price per sales price unit of measure. This field is calculated by adding the 'Total Price Increase (per Sales Price UoM)' to the 'Trade Base Unit Price.'
Unit Price Excl. VAT	Specifies the new unit price per sales price unit of measure. This is the price as shown in the sales line.
Total Discount Amount	Specifies the sum of all discount values that result from the applied document trade lines, added to the discount value that results from the applied sales discount line.
New Line discount % in sales line	Specifies the new line discount percentage, as shown in the sales line. This value is calculated by adding the 'Base Line Discount %' (recalculated to an amount using the 'New Unit Price') to the 'Total Discount Amount' and relating this total discount amount to the 'New Unit Price'.

The **Applied Trade Lines** FastTab displays the following fields related to the applied price (**Price** group) and the applied discount (**Discount** group) only when the Aptean [Trade Management](#) extension is installed.

Field	Description
Base Discount Value	Indicates the discount value derived from the applied sales discount line. For catch weight items, this amount is calculated by multiplying the discount value (converted) by the weight factor and the quantity specified on the sales line.
Discount Amount from Trade Lines	Indicates the total discount amount accumulated from all the applied document trade lines. This value is calculated by summing the Amount field values from each document trade line with the Price Rule field set as <i>Discount</i> .

For percentage-based discounts, the system displays the discount percentage and recalculates the line discount based on the combined discount amount.

For amount-based discounts, the system shows the discount per unit and adjusts the line discount percentage accordingly.

You can also view these fields on the following pages:

